



STATE OF CALIFORNIA

DEPARTMENT OF ALCOHOL AND DRUG PROGRAMS

Request for Proposals

ADP-RFP-06-5

California Methamphetamine Initiative

Public Education Campaign

<http://www.adp.ca.gov>

TABLE OF CONTENTS

I. GENERAL INFORMATION	1
A. Goal.....	1
B. Background	2
C. Authorization.....	3
D. Minimum Qualifications of Proposer	4
E. Contract Period.....	5
F. Funding	5
G. Contract Terms and Conditions	6
H. Scopes of Work and Deliverables.....	7
I. Estimated Time Schedule.....	7
J. Proposer Questions	7
II. OVERVIEW OF PROPOSAL PROCESS	8
A. Advertising Module	8
B. Public Relations Module	8
III. SUBMISSION REQUIREMENTS	9
A. Submission	9
IV. TECHNICAL PROPOSAL – ADVERTISING.....	11
A. Mandatory Requirements	11
B. Technical Proposal Scoring.....	12
C. Written Proposal	13
1. Agency Capabilities	13
2. Creative Capabilities.....	16
3. Proposed Strategy	17
4. Proposed Budgets	18
V. COST PROPOSAL - ADVERTISING	20
Cost Proposal Scoring	20
VI. ORAL PRESENTATION - ADVERTISING	21
1. Duration, Participation, and Location	21
2. Preparation	21
3. Oral Presentation and Interview Scoring	22
VII. TECHNICAL PROPOSAL – PUBLIC RELATIONS	22
A. Mandatory Requirements	22
B. Technical Proposal Scoring.....	23
C. Written Proposal	24
1. Agency Capabilities	24
2. Creative Capabilities.....	27
3. Proposed Strategy	27
4. Proposed Budgets	28
VIII. COST PROPOSAL – PUBLIC RELATIONS	32
Cost Proposal Scoring	32

IX. ORAL PRESENTATION – PUBLIC RELATIONS.....	33
1. Duration, Participation, and Location.....	33
2. Preparation.....	33
3. Oral Presentation and Interview Scoring	33
X. CONTRACT AWARD	34
A. Notice of Intent to Award Contract.....	34
B. Confidentiality of Proposals	34
C. Rejection of All Proposals.....	34
D. Protests	35
E. Disposition of Proposals	35
F. Contact Information	36
G. News Releases.....	36
Attachment A Cover Page	37
Attachment B Significant Contract Terms	39
Attachment C Scope of Work Requirements - Advertising	49
Attachment D Scope of Work Requirements – Public Relations	52
Attachment E Conflict of Interest Certification.....	55
Attachment F Sample Budget Advertising.....	57
Attachment G Sample Budget – Public Relations	59
Attachment H Disabled Veteran Business Enterprise Participation.....	61
Attachment I State Economic Development Incentive Programs	68
Attachment J Evaluation and Selection Process	71
Attachment K Travel and Subsistence Guidelines.....	73

I. GENERAL INFORMATION

A. Goal

The Department of Alcohol and Drug Programs (ADP) received \$28.35 million over three years to conduct a statewide methamphetamine prevention campaign including advertising and public relations beginning in April 2007. It is anticipated that funding for these efforts will be available through December of 2009 at \$9.45 million per contract period and will be awarded over 32 months (contingent upon the availability of funding). The funding periods include: year 1 – April 2007-December 2007, \$9.45 million; year 2 – January 2008 – December 2008, \$9.45 million; year 3 – January 2009 – December 2009, \$9.45 million.

This Request for Proposal (RFP) is intended to solicit advertising and public relations firms to develop and manage a statewide public education campaign to prevent methamphetamine use, encourage discontinued use and motivate individuals to seek help if necessary. **Proposers may bid on the campaign in any of the following ways:**

- A firm may bid on one or both parts (advertising, public relations) of the comprehensive campaign.
- Firms may partner and bid on one or both parts of the comprehensive campaign.

ADP will score the public relations and advertising portions of the bids separately.

Proposers are expected to submit a complete budget within their proposal. The budget should identify cost categories as envisioned under the project and must break out any commissions or overhead rates to be assessed.

Budgets for advertising proposals in year one may not exceed \$7 million, \$7.56 million in year two and \$7.10 million in year three. Public relations budgets in year one may not exceed \$2.45 million, \$1.89 million in year two and \$2.35 million in year three.

Proposers are asked to develop and implement a comprehensive, statewide advertising and public relations campaign targeting two priority audiences:

- Men Having Sex with Men (MSM)
 - Ages 18-49
 - White and Latino
- Women of Child Bearing Years
 - Ages 12-25
 - White, Latina and Asian Pacific Islander

ADP envisions a campaign that targets the MSM population first.

For both target audiences, the campaign should feature, but is not limited to, advertising, promotion, public relations, a visible campaign launch event, outreach, collateral development and research. Proposers should seek added value opportunities throughout the campaign.

In addition to English, the campaign should feature Spanish and Asian language materials.

Successful proposers will be expected to involve the 58 County Offices of Alcohol and Drug Programs in campaign activities and to provide Public Relations and Advertising support for the California Methamphetamine Information 800 Line.

Work Plans should be developed during each year of the campaign identifying activities to reach the priority populations, how the activities will be developed and implemented within the campaign, timelines and milestones by which ADP can measure progress.

The proposer must be an organization in good standing with the State of California and the federal government, and must comply with non-discrimination and drug-free workplace requirements.

B. Background

Methamphetamine abuse is increasingly recognized as a problem in California, and is reflected in addiction treatment data showing that methamphetamine is currently the primary drug of abuse for 34.3% of the state's treatment population, having surpassed alcohol as the primary drug of abuse in 2001. Further, treatment admissions for methamphetamine addiction in California make up 40% of all admissions nationwide for methamphetamine addiction.

Two populations have experienced a disproportionate impact of the methamphetamine epidemic. Methamphetamine emerged as a party drug for **men who have sex with men (MSM)**, lowering inhibitions and contributing to the spread of HIV/AIDS, Hepatitis C, and other sexually transmitted diseases. According to the California Society of Addiction Medicine, from 30 to 50% of those with a newly identified HIV infection use methamphetamine. A survey by the Centers for Disease Control and Prevention found that methamphetamine use was more common in men infected with HIV. Researchers from the University of California, San Diego, reported at an AIDS Conference this year that methamphetamine is the major driver of the HIV epidemic in the United States.

Methamphetamine abuse has also had a disproportionate impact on **women of childbearing years**. Methamphetamine is the primary drug for women in California's treatment system and it disproportionately impacts women of childbearing years. Methamphetamine was identified as the primary drug of abuse by 41% of women

compared to 30% of men. According to California treatment statistics, methamphetamine is the primary drug of abuse for women ages 12-25 entering treatment in 53 of 58 counties compared to 18 of 58 counties for men, ages 12-25. Methamphetamine is the primary drug of abuse for 53% of Asian Pacific Islander women, 48% of Latina women, and 46% of Caucasian women admitted to treatment. According to the California Welfare Directors Association, methamphetamine is a factor in 60% to 80% of the child neglect and endangerment caseload. A 2004 study by the National Association of Counties found a 71% increase in out-of-home child custody placements in some California counties due to methamphetamine abuse.

Based on these findings, ADP formed the California Methamphetamine Initiative (CMI).

The purpose of this initiative is threefold:

- Prevent methamphetamine use;
- Encourage discontinued use of methamphetamine; and
- Motivate current methamphetamine users to get help if needed.

The CMI is designed to combat the devastating effects of methamphetamine use through public education; information dissemination for practitioners on promising practices in prevention and treatment; and, active collaboration with local efforts to address the growing methamphetamine problem in California. Currently, components of the CMI include the Partnership for a Drug Free America Campaign, a Practitioner's Treatment Reference Guide, and the Governor's Prevention Advisory Council.

The public education campaign should be coordinated with these other elements of the California Methamphetamine Initiative:

- Partnership for a Drug-Free America Campaign. This is a public education campaign to educate adolescents, women, and men who have sex with men on the problems associated with methamphetamine addiction.
- Practitioner's Treatment Reference Guide. This guide, the first of its kind for treatment providers, will provide the most effective methods of treating methamphetamine addiction.
- Governor's Prevention Advisory Council. Developed a report summarizing programs and strategies to prevent methamphetamine abuse. A copy of the report can be found at www.adp.ca.gov.

C. Authorization

In order to address the growing methamphetamine problem, AB 1801 (Chapter 47, Statutes of 2006) provides funding for ADP to identify potential target audiences for

prevention, suggest messages for prevention and consider strategies for using media, community involvement and public relations to reach target audiences.

In addition, SB 1500 requires ADP to develop and implement a statewide campaign designed to deter initial, and continued, use of methamphetamine in California and authorizes ADP to collect private donations to fund methamphetamine prevention campaigns. The proposed campaign is to target communities or populations that use methamphetamine at a greater rate than the general population; communities or populations in which transmission and contraction of HIV and AIDS, Hepatitis C, and other diseases is significantly related to methamphetamine use; communities or populations in which the use of methamphetamine is likely to have a negative effect on children; communities or populations at risk due to environmental damage caused by methamphetamine production; and any other community or population that is at a high risk of methamphetamine use or addiction.

The implementation of the campaign will include collaboration with public and private organizations to extend its message to a wide range of venues and media outlets. The legislation directs the department to conduct research to measure the effect of the prevention campaign and report its findings annually to the chairpersons of the appropriate Senate and Assembly Health committees.

D. Minimum Qualifications of Proposer

The proposer, and each of the proposer's subcontractors, must have demonstrated experience in advertising and/or public relations. Proposers must have demonstrated experience in developing and managing statewide social marketing and/or public education campaigns. The proposer should have strong strategic planning capabilities to produce an effective advertising *and/or* public relations campaign based on research analyses. The proposer must have:

1. Strong project management skills and the ability to manage a team of subcontractors, if necessary, to cover all components of the Scope of Work (SOW).
2. A plan best suited to address CMI's priorities.
3. Demonstrated and effective experience in managing public relations *and/or* advertising development, production, and placement.
4. Demonstrated understanding of the issue.

The proposing agencies must have creative ideas, organizational and strategic planning capabilities, cost effectiveness, and the ability to target relevant populations through a strategic public relations and advertising plan.

The proposer shall have a current operating California-based office that has been in business in California since January 1, 2002, or longer, that would service the ADP

account. The proposer shall have had at least \$10 million in gross advertising billings per year and/or \$4 million in gross billings per year for public relations in calendar years 2003, 2004, and 2005 from the California-based office that would service the ADP account.

Proposing agencies are not required to subcontract components of the campaign if they possess the capacity to accomplish the entire SOW in-house. For those proposing agencies that do propose subcontracting, it is optimal to identify subcontracting agencies during the proposal process. **Also, ADP does encourage the use of Disabled Veteran Business Enterprise (DVBE) subcontractors, where a minimum of three percent of the total proposal dollars are dedicated to the DVBE.** At the very least, proposing agencies must make clear in their proposals which components of the SOW, if any, would be performed under a subcontract. **Proposing agencies shall not sign exclusive agreements with subcontractors.** All subcontractors will be subject to review and approval by ADP.

In addition, contractor and sub-contractor must abide by and are held to contractual requirements as defined in **Attachment B**, "Significant Contract Terms."

E. Contract Period

1. The anticipated contract term is for 8 months from the time of contract start up with the possibility of renewal for two additional 12-month contract periods.
2. Proposals should be based on a performance period of the 8-month base period stated above, plus the potential extension of two years, for a total of 32 months. Since social marketing campaigns are based upon long-term behavior change, proposals should present stages of development over this time frame.
3. The resulting contract will be of no force or effect until both parties sign it. The proposing agency is hereby advised not to commence performance until the contract is formally awarded and all approvals are obtained. Should performance commence before all approvals are obtained, said services shall be considered to have been volunteered.
4. The method of payment to the Contractor will be cost reimbursement. The cost reimbursement method of payment reimburses the Contractor no more frequently than monthly, in arrears, in accordance with the budget for actual expenditures incurred. An amount equal to 10 percent of each payment will be withheld as a final payment. No more than 90 percent of the contract amount will be paid prior to receipt of the required final report.

F. Funding

1. The estimated value of the RFP will not exceed \$28.35 million, with budgets not to exceed \$9.45 million each year.

2. Funding for each year of the contract is subject to approved multi-year spending authority and an annual appropriation by the State Legislature and approval of the Governor. If full funding does not become available, and ADP cannot allocate comparable levels of funding, ADP may cancel the resulting agreement or amend it to reflect reduced funding and reduced activities.
3. If changes are required by legislation, court action, or other administrative action affecting the CMI, the contract shall be amended or terminated accordingly in order to comply with these actions.
4. Funding for each year of the contract will be dependent upon successful contractor performance. After the completion of the first 8 months, and optionally, annually thereafter, ADP will conduct a performance review. These reviews will determine whether the contractor is performing to the satisfaction of ADP, meeting expectations and deadlines, and abiding by the terms of the contract, and should therefore be recommended for continuation of the contract.
5. If, after the first 8 months of the contract, the contractor does not pass the annual performance review, ADP may elect to terminate the initial contract with 30-days written notice.
6. If additional funds (up to 30 percent of the original contract amount, not to exceed \$250,000) become available, it is at ADP's sole discretion to request an amendment to the existing contract.

G. Contract Terms and Conditions

1. Following the selection process to determine which proposer(s), if any, is to be an award recipient, a contract will be prepared between the selected proposer(s) and ADP. The contract will be based upon the Proposal and all criteria contained in this RFP. The State does not accept alternate contract language from a prospective Contractor. A proposal with such language will be considered a counter proposal and will be rejected. No oral understanding or agreement shall be binding on either party.
2. Upon award of the Agreement, Contractor must complete and submit to ADP the Payee Data Record (STD 204, Rev. 6/2003) to determine if the contractor is subject to state income tax withholding pursuant to California Revenue and Taxation Code Sections 18662 and 26131. This form can be found on the Internet at:

<http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf>

No payment shall be made unless a completed STD 204 has been returned to the awarding agency. This document is required only if it is not already on file with awarding agency.

<http://www.ols.dgs.ca.gov/standard+language>

This document is only required if the contractor has not submitted this form to the awarding agency within the last three years.

4. Upon award of the Agreement, a Statement of Economic Interests Form may be required of selected proposer's staff, or Subcontractor's staff who are "consultants" as defined in the Political Reform Act of 1974. These disclosures would include all interests in real property, investments, business positions, and sources of income, including gifts, loans, and travel payments. The Statement of Economic Interests Form (Form 700) can be found at

www.fppc.ca.gov

Please use the "Form 700 (2004/05)" link/version.

H. Scopes of Work and Deliverables

See Attachment C: *Advertising Scope of Work*, and/or Attachment D: *Public Relations Scope of Work*.

I. Estimated Time Schedule

Event	Date/Time
1. RFP released to proposers	January 16, 2007
2. Questions due	January 26, 2007
3. Responses to questions posted on ADP website and sent to potential proposers who made such a request	February 2, 2007
4. Letters of Intent due	February 12, 2007
5. Proposals due at ADP	February 23, 2007 at 4:00 p.m.
6. Finalists Notification	March 9, 2007
7. Finalists' Oral Presentation and Interview	March 15/16, 2007
8. Announcement of award of contract	March 29, 2007
9. Period of performance	April 25, 2007 through Dec 31, 2007

J. Proposer Questions

Any questions you may have concerning this RFP should be submitted via e-mail to mdavis@adp.ca.gov or bnorton@adp.ca.gov at the Contract Office by **January 26, 2007, by 4:00 pm**. Answers to questions will be posted in the State Contract Register at www.cscr.dgs.ca.gov and on the ADP Web site www.adp.ca.gov. No further questions will be accepted following the close of the question and answer period.

II. OVERVIEW OF PROPOSAL PROCESS

Responses to both modules of this RFP will be reviewed using a two-step process consisting of: a written proposal review, and an oral presentation and interview stage. In order to be invited to advance to the oral presentation and interview stage, proposers must meet preliminary eligibility requirements and score a minimum of 252 points on the written proposal review.

A. Advertising Module

Step 1. Written proposals, Advertising (315 total possible points, 53%) are due to ADP offices by **February 23, 2007 at 4:00 pm**. Proposals will be reviewed and assigned scores as described in Section IV. of this RFP.

Step 2. Oral presentations and interviews, Advertising (100 total possible points, 17%) will be scheduled immediately following completion of the scoring of all written proposals. Bidders whose proposals score a minimum of 252 points or 80% of the written portion of the technical proposal will be invited to make presentations as described in Section VI and Section IX of this RFP. The interview and presentation stage is expected to be complete by **March 16, 2007**. The top scoring advertising and top scoring public relations proposals will be awarded the contract. One company may receive this contract provided it has both advertising and public relations capabilities and both public relations and advertising are the top scoring bids in their respective categories.

Step 3. Cost proposal, Advertising (178 possible points), 30%

Total possible points for Advertising including written proposal, oral presentation, and cost proposal: 593 points, 100%

B. Public Relations Module

Step 4. Written proposals, Public Relations (315 total possible points, 53%) are due to ADP offices by **February 23, 2007 at 4:00 pm**. Proposals will be reviewed and assigned scores as described in Section IV. of this RFP.

Step 5. Oral presentations and interviews, Public Relations (100 total possible points, 17%) will be scheduled immediately following completion of the scoring of all written proposals. Bidders whose proposals score a minimum of 252 points or 80% of the written

portion of the technical proposal will be invited to make presentations as described in Section VI and Section IX of this RFP. The interview and presentation stage is expected to be complete by **March 16, 2007**. The top scoring advertising and top scoring public relations proposals will be awarded the contract. One company may receive this contract provided it has both advertising and public relations capabilities and both public relations and advertising are the top scoring bids in their respective categories.

Step 6. Cost proposal, Public Relations (178 possible points), 30 %

**Total possible points for Public Relations Module, including written proposal, oral presentations and interviews, and cost proposal :
593 points, 100%**

It is the proposer's responsibility to check for notices and addenda for this RFP at <http://www.adp.ca.gov> at least weekly until the due date for proposals.

III. SUBMISSION REQUIREMENTS

This section contains the specific instructions for all stages of the proposal. All of the instructions should be reviewed thoroughly. At the completion of each stage, agencies will be notified by telephone with a follow-up confirmation in writing as to whether they qualify to continue on to the next stage. Those agencies competing in the oral presentation and interview stage will receive additional instructions upon notification.

A. Submission

One original and six (6) copies of the Bid Proposal must be submitted in a sealed envelope marked Technical Proposal, along with another separate, sealed envelope marked "Cost Proposal" and received and time stamped by an ADP employee no later than **February 23, 2007 at 4:00 pm**. Proposals received after the due date and time will not be considered. Postmarks will not be accepted as meeting the deadline.

Faxed proposals will not be accepted. If you plan to deliver your proposal in person, please allow at least 15 minutes to go through ADP's security procedures. **Security guards are not ADP employees and will not time stamp proposals.**

Note: Delivery and postal services often deliver after the specified due date/time. It is the proposer's responsibility to ensure that the bid and proposal arrive at ADP before the deadline.

Proposals must be clearly marked with the RFP number and title and be addressed to:

Margret Davis or Barbara Norton
Contracts Office, Division of Administration
Department of Alcohol and Drug Programs
1700 K Street, First Floor
Sacramento, CA 95814-4037

1. The proposer's narrative response to the technical portion of the proposal should be double-spaced and submitted on standard white, 8½" x 11" sized paper. The project work plan may be single-spaced. Each page shall be clearly and consecutively numbered. Responses to each item in this RFP must be identified with the same numbers and letters of the paragraph in the RFP to which the response applies.
2. Costs for developing proposals are entirely the responsibility of the proposer and shall not be chargeable to the State of California or included in any cost elements of the price.
3. ADP may reject any proposal at its discretion that does meet the criteria of the solicitation, including those that are conditional, incomplete, contain any alterations of form, or other material irregularities of any kind.
4. The Bid Proposal shall be signed by an individual who is authorized to bind the proposing firm contractually. The signature must indicate the title or position that the individual holds in the organization. An unsigned or improperly signed Bid Proposal may be rejected.
5. A proposal may be modified after its submission by withdrawal and resubmission prior to the time and date specified for proposal submission. Modification offered in any other manner, oral or written, will not be considered.
6. A proposer may withdraw his/her proposal by submitting a written request for its withdrawal to the State, signed by the proposer or an agent. The proposer may then submit a new proposal prior to the proposal submission deadline. Proposals may not be withdrawn after the final submission deadline.
7. Proposers, before submitting their documents, should carefully proof them for errors and adherence to the RFP requirements.
8. The awarding agency may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum to all parties who received a proposal package.
9. Issuance of the RFP in no way constitutes a commitment by ADP to award a contract. ADP may reject any or all proposals for reasonable cause and may waive any immaterial deviation of a proposal. The State's waiver of an immaterial

defect shall in no way modify the RFP documents or excuse the proposer from full compliance with the RFP and the proposer's proposal if the proposer is awarded the contract. ADP may also cancel this RFP at any time.

IV. TECHNICAL PROPOSAL - ADVERTISING

A. MANDATORY REQUIREMENTS.....(Scoring: pass/fail)

All submissions will be screened to determine if they meet the mandatory requirements of the RFP. Mandatory requirements are pass/fail and are not awarded points. Agencies that provide one (1) original and six (6) copies of all information requested below no later than **February 23, 2007, at 4 p.m.**, and meet all of the mandatory requirements will qualify to continue in the proposal process. **Failure to meet all mandatory requirements will cause the proposal to be rejected and no further evaluation of that proposal will take place.**

The Technical Proposal shall be placed in a sealed envelope marked "Technical Proposal". This envelope should contain no cost proposal information of any kind. Cost proposal information should be placed in another sealed envelope, please see Section V, "Cost Proposal".

Responses should be submitted in the same order as the following outline:

1. Cover Page

Complete the Stage 1–Cover Page (**Attachment A**).

A person authorized to bind the proposer must sign the Proposal Cover Page with an original signature. If the proposer is a corporation, a person authorized by the Board of Directors to sign on behalf of the Board must sign the Proposal Cover Page. (mandatory requirement, pass/fail)

2. California Office

Provide a signed letter from the C.E.O. certifying that the proposer has a currently operating, California-based office that has been in business in California since January 1, 2002, or longer, that would service the ADP account. (mandatory requirement, pass/fail)

3. Gross Billings

The proposer must provide a statement by a CPA certifying that the agency had at least \$10 million in gross annual billings in advertising per year in calendar years 2003, 2004, and 2005 from its California-based office that would service the ADP account. This signed statement should include the actual billings for

each calendar year. (Mandatory requirement, pass/fail)

Financial records received by ADP will be destroyed at the conclusion of the protest period or after any protest has been resolved.

4. Conflict of Interest Certification

Complete the Conflict of Interest Certification - **Attachment E** (mandatory requirement, pass/fail)

Conflicts of interest include, but are not limited to, the following examples:

- a) An instance when the proposer/Contractor or any of its subcontractors, or any employee, officer, or director of the proposer/Contractor or any subcontractor holds a position of interest, financial or otherwise, which would allow use or disclosure of information obtained while performing services for CMI, for private or personal benefit or for any purpose that is contrary to the goals and objectives of CMI.
- b) Employing, subcontracting or otherwise remunerating any immediate family member of an ADP employee for work or services performed on the CMI Campaign. Immediate family includes any parent, spouse, child, or domestic partner.
- c) Receiving assistance from groups and individuals who advised in the development of the California Methamphetamine Initiative.

B. Technical Proposal Scoring

The maximum score possible for the written portion of the Technical Proposal is **315 points**. The minimum score ADP will accept for the written portion of the Technical Proposal is **252 points or 80%**. This score will be determined by a selection review committee. Those proposals not meeting the minimum score will not be considered for funding. The four weighted evaluation criteria and their respective possible points are:

<u>Written Proposal</u>	<u>Maximum Possible Score</u>
Agency Capabilities	70 Points
Creative Capabilities	85 Points
Proposed Strategy	100 Points
Budget	<u>60 Points</u>
	315 Points
<u>Oral Presentation</u>	100 Points

Total Points for technical proposal 415 Points

The proposer with the highest total points will be awarded the contract. If two or more finalists are tied, the finalist with the highest written proposal score will be awarded the contract. If two or more of the highest written proposal scores are tied, ADP may at its sole discretion, employ a tie-breaking method of its choosing.

C. Written Proposal

1. Agency Capabilities(Scoring: 70 points)

The proposer and its subcontractors are required to demonstrate their capabilities. If partnering, a capabilities section for each partner must be included.

a) Executive Summary (30 points) (10 pages maximum)

Service Capability: Describe how your agency will provide services, including, but not limited to account service, creative development, market research, evaluation, media planning/buying, production, promotion, outreach, publicity, and expert advice on key trends and issues in advertising and/or public relations.

Agency Strengths and Experience: Describe the strengths of your organization, including historical accomplishments, account leadership, and experience with outreach to large population segments (e.g. White and Latino MSM, Asian Pacific Islander and Latina women of childbearing years, including teen girls.)

Challenges: From the agency's own understanding of challenges associated with methamphetamine use and addiction in California, describe how a public education campaign can be effectively used to address these challenges.

Priorities: Describe how your agency will achieve the goals of the campaign. Describe how your agency will successfully address ADP's two priority markets: MSM and females of child-bearing years. Describe your agency's cultural awareness and sensitivity to the population being served by the campaign. Describe how your agency will achieve social or behavioral change through social marketing when dealing with methamphetamine use.

Subcontractor Plan: Indicate any plans to meet obligations through subcontractors.

b) Organizational Chart (5 Points)

The proposer shall provide an organizational chart of its company indicating the location and anticipated supervisory responsibilities of managers and staff assigned to the ADP account. Indicate vacant staff positions, positions that

would be created to handle workload of the contract, as well as the percentage of time each proposed team member would devote to the ADP account. Also indicate any key staff whose primary physical location will be anywhere other than the California-based office that will service this account. The organizational chart must indicate relationships to a parent company and subsidiaries, if any.

**c) Agency Personnel (10 points)
(2 pages maximum/per employee)**

The proposer shall provide résumés of account, creative, and media staff who will be assigned to the ADP account. Include staff or proposed consultants that would be responsible for Screen Actor's Guild and American Federation of Television and Radio Artists negotiations. All résumés shall include the following:

- 1) Name, title, and current office address.
- 2) Description of relevant expertise, capabilities, and credentials in general market advertising, public relations, and/or a related field, including number of years. Emphasize experience in creating, directing, overseeing, coordinating, or managing public education, and/or social marketing campaigns.
- 3) Assigned accounts, duties, and level of responsibility from January 1, 2003 to present.
- 4) Indicate percentage of staff member's time to be devoted to the methamphetamine public education campaign.
- 5) Proposed responsibilities on the ADP account.

d) Client References (5 points)

Provide three (3) client references from accounts active at any time during the period of January 1, 2003 through June 30, 2006, whose needs were similar in nature and scope to the campaign being proposed. References will be contacted as part of the scoring of the agency capabilities.

e) Account History (10 points)

Provide a complete list of clients from June 30, 2003 through June 30, 2006 with the following information:

- i. Client's name, address, and telephone number.
- ii. Start date of contract.

- iii. End date of contract.
- iv. Status of each account as open or closed.
- v. For closed accounts, indicate the reason for discontinuation.
- vi. Describe services provided.
- vii. Approximate size of each account in terms of annual billings. Accounts of \$1 million or more shall be rounded to the closest \$1 million. Accounts less than \$1 million shall be rounded to the closest \$250,000.
- viii. Clear and specific focus on:
 - *Social marketing*: promotion of attitude and behavior change.
 - *Government*: local, state, or federal government accounts.
 - *Nonprofit*: nonprofit private sector clients.
 - *Pro bono*.
 - *Local collaborative*: franchises, community-based organizations, and/or local businesses with similar goals.
 - *Priority population*: work targeted toward one or more of ADP's priority populations: MSM; Women.
 - *Sub-groups of special interest*: Asian American and Pacific Islander; Hispanic/Latino; Lesbian, Gay, Bisexual, and Transgender (LGBT); and Low Socio-economic Status (SES).

f) Evaluation (10 points)
(5 pages maximum)

- i. Describe the procedures your agency uses to track, analyze and evaluate effectiveness of advertising campaigns. Include in your description whether these functions are normally performed in-house or by a subcontractor or consultant.
- ii. Describe past research projects on behalf of a client.
- iii. Describe method(s) previously used by your agency to analyze the content and emphasis of a campaign's strategic components. Include:
 - Describe steps normally taken to substantiate factual content of messages.
 - How substantiated facts are collected, updated, and archived by agency.
 - Include the name and address of the person or firm designated to review messages and substantiate their factual content for legal compliance.

2. Creative Capabilities(**Scoring: 85 points**)

This section of the proposal presentation will give the agency a chance to highlight a variety of its accomplishments. Through case histories containing visual materials and written descriptions, the agency shall provide the ADP with a sense of the agency's style and range, as well as an understanding of the agency's strategic and creative capabilities.

- i. Provide one advertising case study similar in size or scope to the methamphetamine campaign being proposed, describing: **(30 points)**
 - Key facts from background market research and analyses
 - Identification of target markets, including approximate audience size, age range, language, and culture/ethnicity
 - Budget
 - Media objectives
 - Creative strategy/positioning
 - Campaign evaluation including outcomes and the impact of the campaign
 - Other considerations (e.g. budget, competition, organizational, and environmental constraints)
- ii. Provide finished creative from the case study above. **(15 points)**
- iii. Provide up to three work samples from other campaigns that illustrate your agency's unique creative strengths. **(10 points)**
- iv. Describe your agency's experiences in media planning and placement including: **(15 points)**

Total gross media spending in California during the 12-months ending June 30, 2006, for:

 - Spot television (provide day-part splits)
 - Spot radio
 - Regional or local magazines
 - newspaper
 - out-of-home
 - internet
 - wireless
 - other media, if any
- v. Percent of total gross billings represented by media during that year. For each medium describe whether media services were performed in-house or through a media buying service. **(5 Points)**
- vi. Any business entity other than the bidder that would be responsible for media planning and purchasing for this contract. If any, for what media services would

they be responsible? Bidders are not required to identify proposed media vendors in their responses to this RFP. **(5 Points)**

vii. Percent of the annual campaign that includes bonus weight or added value placement. Provide history/examples. **(5 Points)**

3. Proposed Strategy(Scoring: 100 points)

a) Concept (65 Points)

Using ADP's overall goals in a narrative format, develop and present a work plan for Year 1 of the Public Education Campaign. The work plan should indicate how you will accomplish the activities outlined in the Scope of Work (Attachment C) and include:

- i. Project goals, objectives, strategies and expected results and outcomes.
- ii. Describe the major components of your plan. This effort could include, but is not limited to, the following components:
 - Research: strategic planning research, use of focus groups, message development.
 - Advertising: Broadcast (Television, Radio, Internet); Print (newspaper, local periodicals, novellas, etc.); Direct Mail; Outdoor/Out of home (billboards, restroom stalls, kiosks, bus boards, etc.).
 - Collateral and Promotional items: Brochures; Community outreach; Toolkits; Newsletters; Posters; Clothing; Temporary items (bar coasters, napkins, etc.); Functional items (water bottles, notepads, magnets, etc.).
 - Local Level Support: coordination with local efforts (PR/media events, community events, technical support and assistance, training for local efforts, etc.).
 - Outcomes: describe tools and strategies you will use to measure desired outcomes.

b) Subsequent Years Concept (35 Points)

Provide a *summary* of your proposed concept for two subsequent years of funding (Year 2: January 1, 2008 to December 31, 2008, and Year 3: January 1, 2009 to December 31, 2009) indicating how you intend to build on the foundation established in Year 1 to reach the new target groups, expand the scope and reach of the campaign, incorporate additional activities, etc.

4. Proposed Budget.....(Scoring: 60 points)

The cost proposal allows agencies to propose the distribution of funds for the campaign component based on a total budget of \$7 million for advertising. Proposals must be fully supported by cost and pricing data adequate to justify the bid amount. Use the Sample Budget Format, **Attachment F, Advertising**. The proposed budgets will be evaluated based on cost-efficacy, cost competitiveness, and best value for services.

- a) A detailed line item budget must be completed showing individual line items under budget categories. **(25 points)**
- b) All budget line items must be fully explained and justified in a narrative entitled "Budget Justification." This justification should include: **(25 points)**
 - 1) Why each individual line item is being charged to the project.
 - 2) Why the quantity of a line item is reasonable (i.e. amount of personnel time, travel, etc).
 - 3) Why the cost of each line item is reasonable in price.
 - 4) Which formula was used to determine the cost of each line item.
- c) To encourage use of a Disabled Veteran Business Enterprise (DVBE), the bidder may dedicate 3%, or more, of the total proposal dollars to a DVBE. The 3% must be a Budget Line Item. See the Sample Budget Format, Attachment F, Advertising. The bidder is required to submit a copy of the DVBE certification. **(10 points).**

Line Item Budget Instructions

A. Direct Cost Categories

The direct cost budget categories are Personnel Services and Operating Expenses.

1. Personnel Services

The Personnel Services category includes each authorized staff position the bidder is devoting to this project listed by title, and a line item for fringe benefits showing the percentage rate.

A line item for each authorized position must provide a computation of the monthly or hourly salary rate, the number of months or hours the position will be filled, and the percentage of salaried time the position will devote to the project.

All salaries must be fully justified in the budget justification and by job titles/duty statements/resumes under Project Personnel.

2. Operating Expenses

The Operating Expenses category include all other direct cost line items, such as rent, travel and subsistence, supplies, consultants, etc.

A line item for rent must identify the number of square feet to be utilized for the project, and the cost per square foot.

ADP policy does not allow for purchase of furniture or equipment. Equipment is defined as an article of nonexpendable tangible personal property. A line item for equipment rental, use allowance (not to exceed 6.67% of acquisition cost annually), or depreciation must identify the type of equipment.

Reimbursement for travel and per diem expenses from ADP shall, unless otherwise specified in the resulting contract, be at the rates currently in effect, as established by the California Department of Personnel Administration (DPA). Those rates are specified in the Department's Travel and Subsistence Guidelines, **Attachment K**. Food and beverage are unallowable costs except for meals permitted by the subsistence guidelines. If the rates change during the term of any agreement resulting from this solicitation, the new rates shall apply upon their effective date and no amendment to said agreement shall be necessary. No travel outside the State of California shall be reimbursed without prior written authorization from ADP.

Consultant's costs must be fully explained and justified, including the cost per hour and number of hours. Consultant travel and per diem costs must be shown separately from staff travel costs. Fees should be consistent with the annual income of each consultant and market rates of similar services.

B. Indirect Cost Categories

An indirect cost category is not allowable within the budget.

C. Overhead or Administrative Costs

An overhead or administrative cost category must be approved by the State. The bidder must provide a list of all costs included in this category, including the methodology used to compute these costs.

Costs included as overhead or administrative costs may not be simultaneously shown as direct or indirect costs in other parts of the budget. The State may request direct costing.

D. Miscellaneous or Other

There should be no line items entitled miscellaneous, other, or fees. All line items must be fully explained and justified.

E. Budget Negotiations

The proposed budget may be modified at the option of the State, but the total bid amount may not be increased.

F. Method of Payment

The method of payment to the Contractor will be cost reimbursement. The cost reimbursement method of payment is considered a periodic payment for actual allowable expenses incurred up to a specific dollar amount as shown in a line item budget. Payments are initiated upon receipt of an invoice. Payments are made no more frequently than once per month in arrears. Contractor must maintain proof of actual costs.

V. COST PROPOSAL - ADVERTISING

Cost Proposal Scoring

Cost proposal scores will be determined as follows:

Costs should be sealed in a separate envelope and identified by the legend "COST PROPOSAL – ADVERTISING". Only bidders who have passed the technical evaluation will have their costs opened. Placing cost proposal data anywhere in the bid other than sealed envelope will cause a bid to be rejected.

Cost proposal scores will be determined as follows:

The lowest dollar cost proposal is awarded the maximum cost points of 178 points (30%) of the overall proposal score. Other proposals are awarded cost points on the following calculation:

$$\frac{\text{Lowest dollar proposal (divided by)}}{\text{Other proposal dollar amount}} = \text{_____} \times 178 \text{ points} = \text{Cost Score}$$

Calculations up to the nearest tenth of a decimal point will be used.

Disabled Veteran Business Enterprise Program (DVBE)

DVBE participation is encouraged for this project. For instructions on the DVBE requirements, follow the directions in **Attachment H**. For additional information,

please view the DVBE Resources Package at
www.documents.dgs.ca.gov/pd/dvbe/resource.pdf

Economic Development Incentive Preference Programs

For information on State economic development incentive programs refer to the following Internet Web sites listed below. If applying for any of the State's preference programs follow the directions in **Attachment I**.

- 1) Small Business Enterprise (SBE) - <http://www.pd.dgs.ca.gov/smbus/default.htm>
- 2) Target Area Contract Preference Act (TACPA) - www.pd.dgs.ca.gov/edip/tacpa.pdf
- 3) Enterprise Zone Act (EZA) - www.pd.dgs.ca.gov/edip/eza.htm
- 4) Local Agency Military Base Recovery Area (LAMBRA) Act – www.pd.dgs.ca.gov/edip/lambra.htm

VI. ORAL PRESENTATION - ADVERTISING

Agencies scoring a minimum of **252 points or 80%** of the written portion of the technical proposal will be selected to advance to the oral presentation and interview stage. Agencies will be invited to give an oral presentation at a time to be arranged between **March 15, 2007 and March 16, 2007**. Finalists selected for the oral presentation phase will be notified as soon as practical after completion of the written proposal review and scoring.

At the oral presentation and interview, finalists will present the details of the proposed campaign strategy. This will be done before a review panel. Panelists may ask clarifying questions regarding the proposed concept, strategies, staffing and Cost Proposal submitted in the proposal. The following information is included to help participants begin organizing their ideas.

1. Duration, Participation, and Location

Oral presentations will be conducted in Sacramento at the ADP office and will last up to two (2) hours. Account management, creative personnel, and media placement staff shall play a major role in the presentation. Agencies will be responsible for their own travel arrangements.

2. Preparation

Finalists should be prepared to develop an oral presentation based on the campaign proposed in the written proposal. Presentation of creative ideas shall be limited to storyboards, which shall be of the stick figure type.

3. Oral Presentation and Interview Scoring(Scoring: 100 points)

The maximum score for the oral presentation and interview is 100 points

- a) General approach of the campaign. **(20 Points)**
- b) The campaign objectives, strategies, and rationale. **(20 Points)**
- c) Media selection, weight level, and timing rationale. (for advertising agencies only) **(20 Points)**
- d) How success of the campaign will be determined. **(20 Points)**
- e) Strategies agency would employ to maximize the budget while creating a high impact campaign with maximum reach. **(10 Points)**
- f) Why ADP should award the contract to your agency. **(10 Points)**

ADP will review to what extent the agency demonstrates:

- a) The approach to the campaign is innovative and persuasive, with a sound rationale for this approach.
- b) The campaign objectives, strategies, and rationale are appropriate, thorough, and well conceived.
- c) The media selection, weight level, and timing rationale are appropriate to the proposed strategy.
- d) The capabilities of the agency to evaluate the success of the campaign.

VII. TECHNICAL PROPOSAL - PUBLIC RELATIONS

A. MANDATORY REQUIREMENTS (Scoring: mandatory requirement, pass/fail)

All submissions will be screened to determine if they meet the mandatory requirements of the RFP. Mandatory requirements are pass/fail and are not awarded points. Agencies that provide one (1) original and six (6) copies of all information requested below no later than **February 23, 2007, at 4 p.m.**, and meet all of the mandatory requirements will qualify to continue in the proposal process. Failure to meet all mandatory requirements will cause the proposal to be rejected and no further evaluation of that proposal will take place.

The Technical Proposal shall be placed in a sealed envelope marked "Technical Proposal". This envelope should contain no cost proposal information of any kind. Cost proposal information should be placed in another sealed envelope. Please see Section V, "Cost Proposal". Responses should be submitted in the same order as the following outline:

1. Cover Page

Complete the Stage 1–Cover Page (**Attachment A**).

A person authorized to bind the proposer must sign the Proposal Cover Page with an original signature. If the proposer is a corporation, a person authorized

by the Board of Directors to sign on behalf of the Board must sign the Proposal Cover Page. (mandatory requirement, pass/fail)

2. California Office

Provide a signed letter from the C.E.O. certifying that the proposer has a currently operating, California-based office that has been in business in California since January 1, 2002, or longer, that would service the ADP account. (mandatory requirement, pass/fail)

3. Gross Billings

The proposer must provide a statement by a CPA certifying that the agency had at least \$4 million in gross annual billings for public relations per year in calendar years 2003, 2004, and 2005 from its California-based office that would service the ADP account. This signed statement should include the actual billings for each calendar year. (mandatory requirement, pass/fail)

Financial records received by ADP will be destroyed at the conclusion of the protest period or after any protest has been resolved.

4. Conflict of Interest Certification

Complete the Conflict of Interest Certification - **Attachment E** (mandatory requirement, pass/fail)

Conflicts of interest include, but are not limited to, the following examples:

- a) An instance when the proposer/Contractor or any of its subcontractors, or any employee, officer, or director of the proposer/Contractor or any subcontractor holds a position of interest, financial or otherwise, which would allow use or disclosure of information obtained while performing services for CMI, for private or personal benefit or for any purpose that is contrary to the goals and objectives of CMI.
- b) Employing, subcontracting or otherwise remunerating any immediate family member of an ADP employee for work or services performed on the CMI Campaign. Immediate family includes any parent, spouse, child, or domestic partner.
- c) Receiving assistance from groups and individuals who advised in the development of the California Methamphetamine Initiative.

B. Technical Proposal Scoring

The maximum score possible for the written portion of the Technical Proposal is **315 points**. The minimum score ADP will accept for the written portion of the Technical

Proposal is **252 points or 80%**. This score will be determined by a selection review committee. Those proposals not meeting the minimum score will not be further evaluated. The four weighted evaluation criteria and their respective possible points are:

<u>Written Proposal</u>	<u>Maximum Possible Score</u>
Agency Capabilities	70 Points
Creative Capabilities	85 Points
Proposed Strategy	100 Points
Budget	<u>60 Points</u>
	315 Points
 <u>Oral Presentation</u>	 100 Points
 Total Points	 415 Points

The proposer with the highest total points (technical and cost proposals) will be awarded the contract. If two or more finalists are tied, the finalist with the highest written proposal score will be awarded the contract. If two or more of the highest written proposal scores are tied, ADP may, at its sole discretion, employ a tie-breaking method of its choosing.

C. Written Proposal

1. Agency Capabilities.....(Scoring: 70 points)

The proposer and its subcontractors are required to demonstrate their capabilities. If partnering, a capabilities section for each partner must be included.

a) Executive Summary (30 points) (10 pages maximum)

Service Capability: Describe how your agency will provide services, including, but not limited to account service, creative development, market research, evaluation, media planning/buying, production, promotion, outreach, publicity, and expert advice on key trends and issues in advertising and/or public relations.

Agency Strengths and Experience: Describe the strengths of your organization, including historical accomplishments, account leadership, and experience with outreach to large population segments (e.g. White and Latino MSM, Asian Pacific Islander and Latina women of childbearing years, including teen girls.).

Challenges: From the agency's own understanding of challenges associated with methamphetamine use and addiction in California, describe how a public education campaign can be effectively used to address these challenges.

Priorities: Describe how your agency will achieve the goals of the campaign; Describe how your agency will successfully address ADP's two priority markets: MSM and females of child-bearing years. Describe your agency's cultural awareness and sensitivity to the populations being served by the campaign. Describe how your agency will achieve social or behavioral change through social marketing when dealing with methamphetamine use.

Subcontractor Plan: Indicate any plans to meet obligations through subcontractors.

b) Organizational Chart (5 Points)

The proposer shall provide an organizational chart of its company indicating the location and anticipated supervisory responsibilities of managers and staff assigned to the ADP account. Indicate vacant staff positions, positions that would be created to handle workload of the contract, as well as the percentage of time each proposed team member would devote to the ADP account. Also indicate any key staff whose primary physical location will be anywhere other than the California-based office that will service this account. The organizational chart must indicate relationships to a parent company and subsidiaries, if any.

c) Agency Personnel (10 points)
(2 pages maximum/per employee)

The proposer shall provide resumés of account, creative, and media staff who will be assigned to the ADP account. Include staff or proposed consultants that would be responsible for Screen Actor's Guild and American Federation of Television and Radio Artists negotiations. All resumés shall include the following:

- 1) Name, title, and current office address.
- 2) Description of relevant expertise, capabilities, and credentials in general market advertising, public relations, and/or a related field, including number of years. Emphasize experience in creating, directing, overseeing, coordinating, or managing public education, and/or social marketing campaigns.
- 3) Assigned accounts, duties, and level of responsibility from January 1, 2003 to present.
- 4) Indicate percentage of staff member's time to be devoted to the methamphetamine public education campaign.
- 5) Proposed responsibilities on the ADP account.

d) Client References (5 points)

Provide three (3) client references from accounts active at any time during the period of January 1, 2003 through June 30, 2006, whose needs were similar in nature and scope to the campaign being proposed. References will be contacted as part of the scoring of the agency capabilities.

e) Account History (10 points)

Provide a complete list of clients from June 30, 2003 through June 30, 2006 with the following information:

- i. Client's name, address, and telephone number.
- ii. Start date of contract.
- iii. End date of contract.
- iv. Status of each account as open or closed.
- v. For closed accounts, indicate the reason for discontinuation.
- vi. Describe services provided.
- vii. Approximate size of each account in terms of annual billings. Accounts of \$1 million or more shall be rounded to the closest \$1 million. Accounts less than \$1 million shall be rounded to the closest \$250,000.
- viii. Clear and specific focus on:
 - *Social marketing*: promotion of attitude and behavior change.
 - *Government*: local, state, or federal government accounts.
 - *Nonprofit*: nonprofit private sector clients.
 - *Pro bono*.
 - *Local collaborative*: franchises, community-based organizations, and/or local businesses with similar goals.
 - *Priority population*: work targeted toward one or more of ADP's priority populations: MSM; Women.
 - *Sub-groups of special interest*: Asian American and Pacific Islander; Hispanic/Latino; Lesbian, Gay, Bisexual, and Transgender (LGBT); and Low Socio-economic Status (SES).

**f) Evaluation (10 points)
(5 pages maximum)**

- i. Describe the procedures your agency uses to track, analyze and evaluate effectiveness of public relations campaigns. Include in your description whether these functions are normally performed in-house or by a subcontractor or consultant.

- ii Describe past research projects on behalf of a client.
 - a. Describe method(s) previously used by your agency to analyze the content and emphasis of a campaign's strategic components. Include:
 - Describe steps normally taken to substantiate factual content of messages.
 - How substantiated facts are collected, updated and archived by agency.
 - Include the name and address of the person or firm designated to review messages and substantiate their factual content for legal compliance.
 - b. How substantiated facts are collected, updated, and archived by agency. Include the name and address of the person or firm designated to review messages and substantiate their factual content for legal compliance

2. Creative Capabilities(Scoring: 85 points)

This section of the proposal presentation will give the agency a chance to highlight a variety of its accomplishments. Through case histories containing visual materials and written descriptions, the agency shall provide the ADP with a sense of the agency's style and range, as well as an understanding of the agency's strategic and creative capabilities.

- a. Provide one public relations case study similar in size or scope to the proposed methamphetamine campaign, describing: **(30 points)**
 - The approach that you used to accomplish the campaign goals and your rationale for this approach.
 - What research, including baseline, was used to support the development of the campaign approach, and message.
 - Services provided.
 - The timeframe that the work was accomplished.
 - What was unique, creative or innovative about your approach.
 - Campaign evaluation including outcomes and impact of the campaign.
 - b. Provide work samples from the case study above. **(15 Points)**
 - c. Briefly describe three additional campaigns including a problem statement, the campaign plan and outcomes. **(15 Points)**
 - d. Describe what was unique, creative or innovative about each approach. **(25 Points)**
- 3. Proposed Strategy(Scoring: 100 points)**
- a) **Concept (65 Points)**

Using ADP's overall goals a narrative format, develop and present a work plan for Year 1 of the Public Education Campaign. The work plan should indicate how you will accomplish the activities outlined in the Scope of Work (Attachment D) and include:

- i. Project goals, objectives, strategies and expected results and outcomes.
- ii. Describe the major public relations components of your plan. This effort could include, but is not limited to, the following components:
 - Research: strategic planning research, use of focus groups, message development.
 - Public Relations: Publicity; Advocacy; Special Events; Outreach and Community Relations (community presentations, speakers' bureau, workshops, townhall meetings, etc.)
 - Collateral and Promotional items: Brochures; Community outreach; Toolkits; Newsletters; Posters; Clothing; Temporary items (bar coasters, napkins, etc.); Functional items (water bottles, notepads, magnets, etc.).
 - Local Level Support: coordination with local efforts (PR/media events, community events, technical support and assistance, training for local efforts, etc.).
 - Outcomes: describe tools and strategies you will use to measure desired outcomes.

b) Subsequent Years Concept (35 Points)

Provide a *summary* of your proposed concept for two subsequent years of funding (Year 2: January 1, 2008 to December 31, 2008, and Year 3: January 1, 2009 to December 31, 2009) indicating how you intend to build on the foundation established in Year 1 to reach the new target groups, expand the scope and reach of the campaign, incorporate additional activities, etc.

4. Proposed Budget.....(Scoring: 60 points)

The cost proposal allows agencies to propose the distribution of funds for the campaign component based on a total budget of 2.45 million for public relations. Proposals must be fully supported by cost and pricing data adequate to justify the bid amount. Use the Sample Budget Format, **Attachment G, Public Relations**. The proposed budgets will be evaluated based on cost-efficacy, cost competitiveness, and best value for services.

- a) A detailed line item budget must be completed showing individual line items under budget categories. **(25 points)**
- b) All budget line items must be fully explained and justified in a narrative entitled "Budget Justification." This justification should include: **(25 points)**
 - 1. Why each individual line item is being charged to the project.
 - 2. Why the quantity of a line item is reasonable (i.e. amount of personnel time, travel, etc).
 - 3. Why the cost of each line item is reasonable in price.
 - 4. Which formula was used to determine the cost of each line item.
- c) To encourage use of a Disabled Veteran Business Enterprise (DVBE), the bidder may dedicate 3%, or more, of the total proposal dollars to a DVBE. The 3% must be a Budget Line Item. See the Sample Budget Format, Attachment G, Public Relations. The bidder is required to submit a copy of the DVBE certification. **(10 points).**

Line Item Budget Instructions

A. Direct Cost Categories

The direct cost budget categories are Personnel Services and Operating Expenses.

1. Personnel Services

The Personnel Services category includes each authorized staff position the bidder is devoting to this project listed by title, and a line item for fringe benefits showing the percentage rate.

A line item for each authorized position must provide a computation of the monthly or hourly salary rate, the number of months or hours the position will be filled, and the percentage of salaried time the position will devote to the project.

All salaries must be fully justified in the budget justification and by job titles/duty statements/resumes under Project Personnel.

2. Operating Expenses

The Operating Expenses category includes all other direct cost line items, such as rent, travel and subsistence, supplies, consultants, etc.

A line item for rent must identify the number of square feet to be utilized for the project, and the cost per square foot.

ADP policy does not allow for purchase of furniture or equipment. Equipment is defined as an article of nonexpendable tangible personal property. A line

item for equipment rental, use allowance (not to exceed 6.67% of acquisition cost annually), or depreciation must identify the type of equipment.

Reimbursement for travel and per diem expenses from ADP shall, unless otherwise specified in the resulting contract, be at the rates currently in effect, as established by the California Department of Personnel Administration (DPA). Those rates are specified in the Department's Travel and Subsistence Guidelines, **Attachment K**. Food and beverage are unallowable costs except for meals permitted by the subsistence guidelines. If the rates change during the term of any agreement resulting from this solicitation, the new rates shall apply upon their effective date and no amendment to said agreement shall be necessary. No travel outside the State of California shall be reimbursed without prior written authorization from ADP.

Consultant's costs must be fully explained and justified, including the cost per hour and number of hours. Consultant travel and per diem costs must be shown separately from staff travel costs. Fees should be consistent with the annual income of each consultant and market rates of similar services.

B. Indirect Cost Categories

An indirect cost category is not allowable within the budget.

C. Overhead or Administrative Costs

An overhead or administrative cost category must be approved by the State. The bidder must provide a list of all costs included in this category, including the methodology used to compute these costs.

Costs included as overhead or administrative costs may not be simultaneously shown as direct or indirect costs in other parts of the budget. The State may request direct costing.

D. Miscellaneous or Other

There should be no line items entitled miscellaneous, other, or fees. All line items must be fully explained and justified.

E. Budget Negotiations

The proposed budget may be modified at the option of the State, but the total bid amount may not be increased.

F. Method of Payment

The method of payment to the Contractor will be cost reimbursement. The cost reimbursement method of payment is considered a periodic payment for actual

allowable expenses incurred up to a specific dollar amount as shown in a line item budget. Payments are initiated upon receipt of an invoice. Payments are made no more frequently than once per month in arrears. Contractor must maintain proof of actual costs.

VIII. COST PROPOSAL - PUBLIC RELATIONS

Cost Proposal Scoring

A **BIDDER'S** Cost proposal must be sealed in a separate envelope and identified by the legend "**COST PROPOSAL – PUBLIC RELATIONS**". Only bidders who have passed the technical evaluation will have their costs opened. Placing cost proposal data anywhere in the bid other than the sealed envelope will cause a bid to be rejected.

Cost proposal scores will be determined as follows:

The lowest dollar cost proposal is awarded the maximum cost points of 178 points (30%) of the overall proposal score. Other proposals are awarded cost points on the following calculation:

$$\frac{\text{Lowest dollar proposal (divided by)}}{\text{Other proposal dollar amount}} = \text{_____} \times 178 \text{ points} = \text{Cost Score}$$

Calculations up to the nearest tenth of a decimal point will be used.

Disabled Veteran Business Enterprise Program (DVBE)

DVBE participation is encouraged for this project. For instructions on the DVBE requirements, follow the directions in **Attachment H**. For additional information, please view the DVBE Resources Package at www.documents.dgs.ca.gov/pd/dvbe/resource.pdf

Economic Development Incentive Preference Programs

For information on State economic development incentive programs refer to the following Internet Web sites listed below. If applying for any of the State's preference programs follow the directions in **Attachment I**.

- 1) Small Business Enterprise (SBE) - <http://www.pd.dgs.ca.gov/smbus/default.htm>
- 2) Target Area Contract Preference Act (TACPA) - www.pd.dgs.ca.gov/edip/tacpa.pdf
- 3) Enterprise Zone Act (EZA) - www.pd.dgs.ca.gov/edip/eza.htm
- 4) Local Agency Military Base Recovery Area (LAMBRA) Act – www.pd.dgs.ca.gov/edip/lambra.htm

IX. ORAL PRESENTATION - PUBLIC RELATIONS

Agencies scoring a minimum of **252 points** or **80%** of the written portion of the technical proposal will be selected to advance to the oral presentation and interview stage. Agencies will be invited to give an oral presentation at a time to be arranged between **March 15, 2007 and March 16, 2007**. Finalists selected for the oral presentation phase will be notified as soon as practical after completion of the written proposal review and scoring.

At the oral presentation and interview, finalists will present the details of the proposed campaign strategy. This will be done before a review panel. Panelists may ask clarifying questions regarding the proposed concept, strategies, staffing and Cost Proposal submitted in the proposal. The following information is included to help participants begin organizing their ideas.

1. Duration, Participation, and Location

Oral presentations will be conducted in Sacramento at the ADP offices and will last up to two (2) hours. Account management, creative personnel, and media placement staff shall play a major role in the presentation. Agencies will be responsible for their own travel arrangements.

2. Preparation

Finalists should be prepared to develop an oral presentation based on the campaign proposed in the written proposal. Presentation of creative ideas shall be limited to storyboards, which shall be of the stick figure type.

3. Oral Presentation and Interview Scoring **(Scoring: 100 points)**

The maximum score for the oral presentation and interview is 100 points.

- a) General approach of the campaign. (20 Points)
- b) The campaign objectives, strategies, and rationale. (20 Points)
- c) How success of the campaign will be determined? (20 Points)
- d) Strategies agency would employ to maximize the budget while creating a high impact campaign with maximum reach. (20 Points)
- e) Why ADP should award the contract to your agency? (20 Points)

ADP will review to what extent the agency demonstrates:

- a) The approach to the campaign is innovative and persuasive, with a sound rationale for this approach.
- b) The campaign objectives, strategies, and rationale are appropriate, thorough, and well conceived.

- c) The media selection, weight level, and timing rationale are appropriate to the proposed strategy.
- d) The capabilities of the agency to evaluate the success of the campaign.

X. CONTRACT AWARD

A. Notice of Intent to Award Contract

A Notice of Intent to Award a Contract identifying the selected Contractor(s) will be posted on the ADP Web site for a period of at least five (5) working days prior to the contract award date. All finalists that participated in the oral presentation and interview will be notified in writing regarding the contract award decision.

B. Confidentiality of Proposals

Do not mark any portion of your proposal response, any RFP attachment, or other item of required documentation as “Confidential” or “Proprietary.” ADP will disregard any language purporting to render all or portions of a proposal confidential or proprietary.

After ADP posts the Notice of Intent to Award a Contract, each proposal and each proposal’s score sheet are public records, subject to disclosure in accordance with the California Public Records Act (Gov. Code, sec 6250 et seq.) and may be reviewed and copied by the public if requested.

C. Rejection of All Proposals

Issuance of this RFP in no way constitutes a commitment by ADP to award a contract. ADP reserves the right to reject any or all proposals or portions of proposals received in response to this RFP, or to cancel this RFP if it is in the best interest of ADP to do so.

As part of the proposal review process, ADP may review a proposer’s performance under current or prior grants, contracts, or cooperative agreements with the State of California. This may include, but is not limited to, a review of financial and programmatic audits. ADP reserves the right to reject a proposal or proposed subcontractor based on the proposer’s failure to comply with a contractual requirement in a prior grant, contract, or cooperative agreement with the State of California.

A proposal shall be deemed non-responsive and subsequently rejected if any of the following occurs:

1. At any time a submission is received after the exact time and date set forth in Section I of this RFP, “Estimated Time Schedule.”

2. The proposer fails to meet any mandatory requirement as specified in Section IV.A of this RFP, "Mandatory Requirements."
3. The proposer fails to submit or fails to complete and sign all required attachments as instructed in this RFP.
4. The submission contains false, inaccurate, or misleading statements or references.
5. The proposer is unwilling or unable to fully comply with the proposed contract provisions.
6. The proposer supplies conditional cost information, incomplete cost information, cost information containing unsigned/uninitialed alterations or irregularities, or cost information anywhere else in the proposal other than the sealed cost envelope.

D. Protests

Notice of Intent to Award shall be posted in a public place in the Department of Alcohol and Drug Programs, 1700 K Street, Sacramento, CA 95814 for five working days prior to awarding the Agreement. In addition, ADP will fax, e-mail or use U.S. mail to notify bidders.

If any bidder, prior to the awarding of the Agreement, files a protest with the Department of Alcohol and Drug Programs and the Department of General Services, Office of Legal Services, 707 Third Street, Seventh Floor, West Sacramento, CA 95605, on the grounds that the (protesting) bidder should have been awarded the contract had the agency correctly applied the evaluation standards in the RFP, the agreement shall not be awarded until either the protest has been withdrawn or the Department of General Services has decided the matter. It is suggested that you submit any protest by certified or registered mail.

Within five calendar days after filing the initial protest, the protesting bidder shall file with the Department of General Services, Office of Legal Services and the Department of Alcohol and Drug Programs a full and complete written statement specifying the grounds for the protest. It is suggested that you submit this complete written statement by certified or registered mail.

E. Disposition of Proposals

Upon proposal opening, all documents submitted in response to this RFP become the property of the State of California, and will be regarded as public records under the California Public Records Act (GC, Section 6250 et seq.) and subject to review by the public. However, the contents of all proposals, draft proposals, correspondence, agenda, memoranda, working papers, or any other medium that discloses any aspect of a proposer's proposal, shall be held in the strictest confidence until the "Notice of Intent to Award" is posted.

Proposal packages may be returned only at the proposer's expense, unless such expense is waived by ADP.

F. Contact Information

Any questions that you may have concerning this RFP should be submitted in writing to the Contract Office by the date listed in RFP Sections I. Estimated Time Schedule and J. "Proposer Questions".

G. News Releases

News releases pertaining to an award resulting from this RFP will not be made without prior written approval of the Director of ADP or the Chief Deputy Director of ADP.

Attachment A

Request for Proposal ADP-RFP-06-5
California Methamphetamine Initiative
Public Education Campaign

COVER PAGE

Use your agency letterhead and state the following:

Date

Margret Davis or Barbara Norton, Contract Analyst
Contracts Office, Division of Administration
Department of Alcohol and Drug Programs
1700 K Street, First Floor
Sacramento, CA 95814-4037

The undersigned certifies that all requirements of the Request for Proposal known as "California Methamphetamine Initiative, Public Education Campaign" ADP-RFP-06-5, were understood and complied with. In addition, the undersigned certifies that neither it nor its principals are debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal or State department or agency. Our all-inclusive bid is as follows:

Primary Contact: _____

E-Mail: _____

Phone: _____

If you plan to subcontract any portion of this contract, please list names and addresses of individuals/organizations:

Individual/Agency Name: _____

Address: _____

Phone: _____ E-mail: _____

Total \$: _____

Bidding on:

Advertising: _____

Public Relations: _____

Both: _____

Signed: _____

Printed Name: _____

Title: _____

Bids shall be signed by the bidder. An unsigned bid or bids submitted without the original signature will be rejected. A bid may be signed by an agent of the bidder if he/she is properly authorized by a power of attorney or equivalent document submitted to the State prior to the submission of the proposal (or with the proposal).

Attachment B

SIGNIFICANT CONTRACT TERMS

1. **Evaluation of Contractor**

Performance of the Contractor under this Agreement will be evaluated. The evaluation shall be prepared on Contract/Contractor Evaluation Sheet (STD 4), and maintained in the Agreement file. For consultant agreements, a copy of the evaluation will be sent to the Department of General Services, Office of Legal Services, if it is negative and if the contract is for an amount over \$5,000 (Public Contract Code, Section 10369).

2. **Conflict of Interest**

Contractor acknowledges that state laws on conflict of interests, found in the Political Reform Act, Public Contract Code Section 10365.5, and Government Code, Section 1090, apply to this contract.

3. **HIPAA Provision**

If any of the work performed under this Contract is subject to the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 (HIPAA), the Contractor shall perform the work in compliance with all applicable provisions of HIPAA. ADP reserves the right to amend this Contract to assure compliance with HIPAA.

4. **Disputes**

If Contractor believes that there is a dispute or grievance between Contractor and the State arising out of or relating to this contract, Contractor shall first discuss and attempt to resolve the issue informally with ADP's Project Representative. If the issue cannot be resolved at this level, Contractor shall adhere to the following procedures:

- A. If the issue cannot be resolved informally with ADP's Project Representative, Contractor shall submit, in writing, a grievance report together with any evidence to ADP's Program Services Division's Deputy Director. The grievance report must state the issues in the dispute, the legal authority, or other basis for the Contractor's position and the remedy sought. Within 10 working days of receipt of the written grievance report from the Contractor, the Division Deputy Director shall make a determination on the problem, and shall respond in writing to the Contractor indicating the decision and reasons therefore. Should the Contractor disagree with the Division Deputy Director's

decision, Contractor may appeal to the next level, following the procedure in "Disputes", paragraph B, listed below.

- B. Contractor must submit a letter of appeal to ADP's Chief Deputy Director explaining why the Deputy Director's decision is unacceptable. The letter must include, as an attachment, copies of the Contractor's original grievance report, evidence originally submitted, and response from ADP's Project Coordinator. Contractor's letter of appeal must be submitted within 10 working days of the receipt of the Program Services Division Deputy Director's written decision. The Chief Deputy Director shall, within 20 working days of receipt of Contractor's letter of appeal, review the issues raised and shall render a written decision to the Contractor. The decision of the Chief Deputy Director shall be final.

5. **Right To Terminate**

ADP reserves the right to terminate this agreement subject to 30 days written notice to the Contractor

The agreement can be immediately terminated for cause. The term "for cause" shall mean that the Contractor fails to meet the terms, conditions, and/or responsibilities of the contract. In this instance, the contract termination shall be effective as of the date indicated on ADP's notification to the Contractor.

6. **Force Majeure**

Except for defaults of subcontractors, neither party shall be responsible for delays or failures in performance resulting from acts beyond the control of the offending party. Such acts shall include but shall not be limited to acts of God, fire, flood, earthquake, other natural disaster, nuclear accident, strike, lockout, riot, freight embargo, public regulated utility, or governmental statutes or regulations super-imposed after the fact. If a delay or failure in performance by the Contractor arises out of a default of its subcontractor, and if such default of its subcontractor, arises out of causes beyond the control of both the Contractor and subcontractor, and without the fault or negligence of either of them, the Contractor shall not be liable for damages of such delay or failure, unless the supplies or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the Contractor to meet the required performance schedule.

7. **Computer Software**

Contractor certifies that it has appropriate systems and controls in place to ensure that state funds will not be used in the performance of this contract for the

acquisition, operation or maintenance of computer software in violation of copyright laws.

8. **Domestic Partners Act**

Pursuant to Public Contract Code, Section 10295.3, no state agency may enter into any contract executed or amended after January 1, 2007, for the acquisition of goods or services in the amount of \$100,000 or more with a contractor who, in the provision of benefits, discriminates between employees with spouses and employees with domestic partners, or discriminates between domestic partners and spouses of those employees.

9. **Requirements for Subcontracts Not Contained in the Proposal.** (Applicable to agreements under which services are to be performed by subcontractors including independent consultants.)

A. For subcontracts not contained in the proposal, prior written authorization will be required before the Contractor enters into or is reimbursed for any subcontract for services costing \$5,000 or more. Except as indicated in paragraph A3 herein, when securing subcontracts for services exceeding \$5,000, the Contractor shall obtain at least three bids or justify a sole source award.

1. The Contractor must provide in its request for authorization, all particulars necessary for evaluating the necessity or desirability of incurring such cost.
2. The State may identify the information needed to fulfill this requirement.
3. Unless otherwise mandated by the funding agency (i.e., federal government), ADP may only pay the Contractor's overhead charges or indirect costs on the first \$25,000 of each subcontract.

B. Agreements with governmental or public entities and their auxiliaries, or a Joint Powers Authority

1. If the total amount of all subcontracts exceeds twenty-five percent (25%) of the total agreement amount or \$50,000, whichever is less and each subcontract is not with an entity or of a service type described in paragraph A3 herein, ADP shall:
 - (a) Obtain approval from the Department of General Services to use said subcontracts, or

(b) If applicable, obtain a certification from the prime Contractor indicating that each subcontractor was selected pursuant to a competitive bidding process requiring at least three bids from responsible bidders, or

(c) Obtain approval from the Secretary of the California Health and Human Services Agency to use said subcontracts.

2. When the conditions of B1 apply, each subcontract that is not with a type of entity or of a service type described in paragraph A3 herein, shall not commence work before ADP has obtained applicable prior approval to use said subcontractor. ADP shall inform the Contractor when ADP has obtained appropriate approval to use said subcontractors.
- C.** ADP reserves the right to approve or disapprove the selection of subcontractors and with advance written notice, require the substitution of subcontractors and require the Contractor to terminate subcontracts entered into in support of this agreement.
- Upon receipt of a written notice from ADP requiring the substitution and/or termination of a subcontract, the Contractor shall take steps to ensure the completion of any work in progress and select a replacement, if applicable, within 30 calendar days, unless a longer period is agreed to by ADP.
- D.** Actual subcontracts (i.e., written agreement between the Contractor and a subcontractor) of \$5,000 or more are subject to the prior review and written approval of ADP. ADP may, at its discretion, elect to waive this right. All such waivers shall be confirmed in writing by ADP.
- E.** Contractor shall maintain a copy of each subcontract entered into in support of this agreement and shall, upon request by ADP, make said copies available for approval, inspection, or audit.
- F.** Sole responsibility rests with the Contractor to ensure that subcontractors, used in performance of this agreement, are paid in a timely manner. The timeliness of said payments may be affected by the timeliness of payments issued by ADP to the Contractor.
- G.** The Contractor is responsible for all performance requirements under this agreement even though performance may be carried out through a subcontract.
- H.** When entering into a consulting service agreement with ADP, the Contractor may be required to supply budget detail for each subcontractor and/or each major subcontracted activity under this agreement.

1. Budget detail format and submission requirements will be determined by ADP.
 2. Methods of including budget detail in this agreement, if applicable, will be determined by ADP.
 3. Any subcontractor budget detail displayed in this agreement, or incorporated by reference, is included for information purposes only. Changes to a subcontractor's identity or budget detail shall not require the processing of a formal amendment to this agreement.
- I. The Contractor shall ensure that all subcontracts for services include provision(s) requiring compliance with applicable terms and conditions specified in this agreement.
 - J. The Contractor agrees to include the following clause, relevant to record retention, in all subcontracts for services:

"(Subcontractor Name) agrees to maintain and preserve, until three years after termination of (Agreement Number) and final payment from ADP, to permit ADP or any duly authorized representative, to have access to, examine or audit any pertinent books, documents, papers and records related to this subcontract and to allow interviews of any employees who might reasonably have information related to such records."
 - K. Unless otherwise stipulated in writing by ADP, the Contractor shall be the subcontractor's sole point of contact for all matters related to performance and payment under this agreement.

10. **Documents and Written Reports**

Any document or written report prepared as a requirement of this agreement shall contain, in a separate section preceding the main body of the document, the number and dollar amounts of all contracts and subcontracts relating to the preparation of such document or report, if the total cost for work by non-employees of the State exceeds \$5,000.

11. **Contract Product Review**

- A. All contract products produced under this contract shall be produced according to the requirements as stated in the Scope of Work.

- B. Prior to release, ADP shall have the right to review products produced as a result of this contract and request changes to those products. Contractor shall use its best effort to incorporate requested changes.

12. **Contract Product Disclaimer/Credit Statements**

- A. If requested by ADP, products, including published materials, reports, brochures, posters, videos, etc. developed or used as part of this contract, shall contain the following or similar disclaimer statement: "The opinions, findings, and conclusions herein stated are those of the authors and not necessarily those of the State of California, Department of Alcohol and Drug Programs."
- B. If requested by ADP, products, including printed materials, reports, brochures, posters, videos, etc. developed or used as part of this contract shall contain the following or similar credit line: "Support for this project has been given by the State of California, Health and Human Services Agency, Department of Alcohol and Drug Programs".

13. **Rights In Data**

- A. Subject Data. As used in this clause, the term "Subject Data" means writings, sound recordings, pictorial reproductions, drawings, designs or graphic representations, procedural manuals, forms, diagrams, work flow charts, equipment descriptions, data files and data processing or computer programs, and works of any similar nature (whether or not copyrighted or copyrightable) which are first produced or developed under this contract. The term does not include financial reports, cost analyses, and similar information incidental to contract administration.
- B. Federal Government and State Rights. Subject only to provisions of (C) below, the Federal Government and State of California may use, duplicate or disclose in any manner and for any purpose whatsoever, and have or permit others to do so, all Subject Data delivered under this contract.
- C. This contract calls for the development and creation of work protected under U.S. copyright law. The work produced under this contract is a "work for hire" and the contractor sells, assigns, and transfers to ADP the entire right, title and interest to the copyright in all work required as a deliverable under this contract. This assignment to ADP includes any registrations and copyright applications, any renewals and extensions thereof, and in and to all works based upon, derived from, or incorporating the material produced under this contract.

- D.** Contractor agrees and warrants:
- 1) that Contractor is the sole owner of all rights in and holds the complete and undivided copyright interest in all deliverables required under this agreement;
 - 2) that all deliverables under this contract do not violate any existing copyright or other third party right and that to the best of Contractor's knowledge the deliverables shall not and do not infringe rights owned by others;
 - 3) that in the case of a multi-authored deliverable, Contractor shall obtain copyright assignment from all co-authors, in writing, and authorization to assign the copyright to ADP and that all co-authors have read and agreed to the above warranties;
 - 4) that all sub-contracts shall include the assignment of all copyright interests to ADP and that each sub-contractor shall warrant the sub-contractor holds the complete and undivided copyright interest in all deliverables required under the sub-contract.
- E.** Marking and Identification. Contractor shall mark all Subject Data with the number of this contract and the name and address of the Contractor or subcontractor who generated the data. The Contractor shall not affix any restrictive markings upon Subject Data, and if such markings are affixed, the Federal Government or State of California shall have the right at any time to modify, remove, obliterate, or ignore any such markings.
- F.** Subcontractor Data. Whenever any Subject Data is to be obtained from a subcontractor under this contract, the contractor shall use sections A, B, C, and D of this clause in the subcontract, without alteration, and no other clause shall be used to enlarge or diminish the Federal Government's; or State of California's rights in that subcontractor Subject Data.
- G.** Referred Ordering and Delivery of Data. The Federal Government or State of California shall have the right to order at any time during the performance of this contract, or within two years from either acceptance of all items (other than data) to be delivered under this contract or termination of this contract, whichever is later, any Subject Data and any data not called for in the schedule of this contract but generated in performance of the contract, and the Contractor shall promptly prepare and deliver such data as is ordered. The Contractor shall exercise its best efforts to prepare and deliver such data as is ordered. The Federal Government's or State of California's right to use data delivered pursuant to this paragraph shall be the same as the right in Subject Data as provided in paragraph (B) above. The Contractor shall be relieved of the obligation to furnish data pertaining to an item obtained from a subcontractor upon the expiration of two years from the date of acceptance of such items. When data, other than Subject Data, is

delivered pursuant to this paragraph, payment shall be made, by equitable adjustments or otherwise, for converting the data into the prescribed form, reproducing it or preparing it for delivery. The terms of such payment shall be agreed upon in writing by the Contractor and the State of California and/or Federal Government, whichever ordered the production of the data.

14. **Contract Product Rights and Licenses**

Contractor shall use its best efforts to secure all rights and licenses necessary for the creation, production or development of the products executed under this contract.

15. **Prior Approval of Training Events/Conferences**

Contractor will be required to obtain prior ADP approval of the locations, costs, dates, agenda, instructors, instructional materials, and attendees at any reimbursable training event, seminar, workshop, or conference and for any reimbursable publicity or educational materials to be made available for distribution. The Contractor shall acknowledge the support of the State whenever publicizing the work under the contract in any media. This requirement does not apply to necessary staff meetings to conduct routine business matters.

16. **Confidentiality of Information**

Contractor shall protect the confidentiality of participant records and information in accordance with Part 2, Title 42, Code of Federal Regulations. Contractor and his or her employees, agents, or subcontractors shall protect from unauthorized disclosure names and other identifying information concerning persons either receiving services pursuant to this contract or persons whose names or identifying information become available or are disclosed to the Contractor, his or her employees, agents or subcontractors as a result of services performed under this contract, except for collection of aggregate statistical information not identifying any such persons.

Contractor shall not use identifying information for any purpose other than carrying out the Contractor's obligations under this contract.

Contractor shall promptly transmit to ADP all requests for disclosure of identifying information not emanating from the client or person.

Contractor, and his or her employees, agents, or subcontractors shall not disclose, except as otherwise specifically permitted by this contract or authorized by the client, any identifying information to anyone other than ADP without prior written authorization from ADP.

Patient identifying information is defined in 42 CRF 2.11 as follows: Patient identifying information means the name, address, social security number, fingerprints, photograph, or similar information by which the identity of a patient can be determined with reasonable accuracy and speed either directly or by reference to other publicly available information. The term does not include a number assigned to a patient by a program, if that number does not consist of, or contain numbers (such as social security or driver's license number) which could be used to identify a patient with reasonable accuracy and speed from sources external to the program.

Upon termination or completion of the work contemplated under this contract, or at such later time as Contractor and ADP may agree, Contractor will destroy any patient identifying information remaining in its possession.

17. **Editorial Guidelines**

Contractor shall use its best efforts to use the following guidelines when writing or speaking about alcohol and other drugs:

“Alcohol and other drugs” is the preferred expression when writing or speaking about drugs, including alcohol. In referring to problems associated exclusively with alcohol, there is no need to use the expanded expression.

“AOD” is an abbreviation that may be used in place of “alcohol and other drugs.” It should be defined at first mention in each chapter or section. It is better used as a modifier (e.g., “AOD use/abuse”) than as a noun (e.g., “the use of alcohol and other drugs”). The judicious use of the term AOD is helpful where it aids conciseness and clarity and should not be employed as a wholesale replacement for the complete expression.

“AOD use (or abuse) prevention,” “AOD problem prevention,” or preventing alcohol and other problems” (or, as appropriate, “use,” “misuse,” or “abuse”) are preferable expressions rather than “AOD prevention.” Alcohol and other drugs cannot be prevented; only their use, misuse, or abuse can be prevented.

Illegal vs. Illicit: Drugs themselves are either illicit or licit; their use can be either illegal or legal. For example, the purchase or public possession of alcohol, licit drug, is illegal for underage youth.

War metaphors such as “war on drugs” are generally not appropriate in prevention message. The various aspects of prevention can be communicated effectively without using military language, which is offensive to many cultures and individuals, and may imply that prevention can be accomplished just by eliminating the drug supply from our Nation.

The term “use” should be employed when making statements about people who should not drink alcohol: youth, pregnant women, recovering alcoholics, or operators of motor vehicles or other machinery. Otherwise, the terms “misuse” and “abuse” are more appropriate. Concerning illicit drugs, the term “use” may connote less of a judgment than the term “abuse,” which may imply that “use” is permissible but “abuse” (undefined) is not. Controversy surrounds this issue, but efforts should be made to be clear about intended meaning.

“Alcohol and other drug use” or “abuse” is preferable over “substance abuse” or “substance use.”

Avoid the generic use of the terms “chemical use” and “chemical abuse” unless referring directly to chemically produced drugs.

Avoid using the term “hard” or “soft” drugs because these terms imply that some drugs, such as marijuana, are virtually harmless.

Use “injected” or injectable drugs rather than the term “IV drugs” or “IV use.”

Avoid the term “recreational use of drugs,” which trivializes drug-taking behavior.

Use “mind-altering drugs” rather than “mood -altering drugs” because the latter does not reflect the potentially powerful physiological effects of alcohol and other drugs.

Use “crack cocaine” instead of “crack” because crack cocaine is a derivative of cocaine.

Use “Methamphetamine” instead of “meth.”

Avoid phrases such as “getting high,” “tripping out,” or “hooked.” These slang expressions trivialize the effects of alcohol and other drug use.

Avoid using derogatory terms such as “drunks,” “potheads,” “dope fiends,” or “drug addicts.” These expressions show a lack of respect for individuals with alcohol and other drug problems.

Attachment C

SCOPE OF WORK REQUIREMENTS ADVERTISING

Upon Department of Alcohol and Drug Programs (ADP) approval of workplans and estimates, the successful contractor(s) will be responsible for, but not limited to, the following components:

1. Services to be Performed

- A.** Based on strategic planning, develop and implement a statewide advertising campaign to prevent methamphetamine use, encourage discontinued use and motivate individuals to seek help if necessary.
- B.** Conduct adequate research to understand target audiences and effective messaging to these audiences. Research may include but is not limited to focus groups, pre-testing, evaluations of the impact of the campaign and recall.
- C.** Strategies should target men who have sex with men (MSM) who are white and Latino. The campaign should also target women of child bearing years who are white, Asian Pacific Islander, and Latina.
- D.** Conceptualize, develop, produce and place:
 - 1) Customized advertising efforts to best reach ADP's priority populations.
- E.** Develop a plan to ensure that advertising content is consistent with and complementary to:
 - 1) ADP-fund public relations activities;
 - 2) California Methamphetamine Initiative.
- F.** Develop and present to ADP:
 - 1) An annual strategic recommendation for the development and placement of advertising based on internal and external research;
 - 2) Evaluation and summary of the effectiveness of advertisements;
 - 3) A cost effective media mix of television, radio, print, outdoor, and other advertising to best reach target populations.
- G.** Develop and maintain an interactive website that will allow visitors to find information about methamphetamine prevention and treatment. The Web site should conform to state standards.

H. Secure added value of at least 30% through activities such as advertising promotion and bonus spots.

I. Develop, implement, and maintain:

Procedures for annually evaluating the effectiveness and impact of the advertising campaign;

- 1) Develop a management and monitoring plan for keeping ADP apprised of all campaign activities, personnel/subcontractors responsible for activities, and an evaluation of the effectiveness and cost efficiency of these activities. At a minimum, semimonthly written activity reports and monthly budget summaries will be provided by the Contractor(s) and subcontractors to ADP, with additional reporting required at the discretion of ADP during peak activity periods. Written status reports from the Contractor(s) and subcontractors shall contain the following information at a minimum:
 - a. A list of open workplans and projects, including, but not limited to, planning, research, creative production, talent fees, contract administration, broadcast traffic, print and outdoor placement, and technical assistance;
 - b. Status of progress and accomplishments for each workplan and project;
 - c. Description of steps remaining for completion of each workplan and project, and the date each step will be completed;
 - d. Problems encountered under this contract, future performance under this contract and any other subjects of concern to the contractor(s) or related to the completion of work under this contract;
 - e. The names of primary and alternate Contractor and State employees assigned to coordinate and implement the workplan or project;
 - f. Date of the status report and distribution list;
- 2) Coordinate monthly conference calls regarding future activities of the advertising campaign. Calls may cover but are not limited to:
 - a. Research and Strategic Planning
 - b. Creative Development
 - c. Advertising Production
 - d. Talent Fees
 - e. Advertising Placement
 - f. Advertising Pre- and Post-testing

- 3) Design, maintain, and monitor a system for substantiating facts used in advertisements, and obtain legal review of finished advertisements, prior to submission to the State for final approval.
- 4) Provide to ADP:
 - a. Copies of scientific studies, research, and calculations used to substantiate the facts used in advertisements. Ensure that facts in new advertisements are valid and consistent with previously produced advertisements;
 - b. The most cost-effective buy-outs and talent agreements;
 - c. Masters of all approved advertising in DVD, recording video cassette, and other effective forms to ADP for the purpose of archiving;
 - d. Advertisement tags where available and when appropriate for local programs or designated toll-free telephone numbers, thus permitting local treatment and health education components to coordinate with the overall CMI as required by ADP;
 - e. Duplicate campaign, advertising materials to county Alcohol and Other Drug programs .

Attachment D

SCOPE OF WORK REQUIREMENTS PUBLIC RELATIONS

1. Services To Be Performed

- A.** Develop and implement a statewide public relations campaign to prevent methamphetamine use, encourage discontinued use and motivate individuals to seek help if necessary.
- B.** Strategies should target men who have sex with men (MSM) who are white and Latino. The campaign should also target women of child-bearing years who are white, Asian Pacific Islander, and Latina.
- C.** Develop a plan to ensure that public relations activities are consistent with:
 - 1. ADP-funded advertising activities.
 - 2. California Methamphetamine Initiative
- D.** Conduct initial research including a baseline survey, post campaign analysis and attitudinal research.
- E.** Develop media relations and outreach activities to reach:
 - 1. Target markets
 - 2. The media including ethnic press such as Latino and Asian Pacific Islander

Activities might include, but are not limited to, community events, and promotional opportunities; spokesperson training, and news releases; press events, press kits; satellite news feeds; op-eds; public opinion research and newsletters.
- F.** Develop a proposal for the development and distribution of collateral materials. Including materials in Spanish and Asian language.
- G.** Develop public relations activities to support the California Methamphetamine Information 800 Line.
- H.** Develop and implement strategies for working with external groups at the local, state and national level.

- I. Develop evaluation strategies for measuring the effectiveness and cost efficiency of the public relations effort.
- J. Provide documentation to ADP as needed for use in preparing reports on the implementation and results of the public relations campaign.
- K. Develop a management and monitoring plan for keeping ADP apprised of all campaign activities, personnel/subcontractors responsible for activities. At a minimum, semi-monthly written activity reports and monthly budget summaries will be provided by the Contractor(s) and subcontractors to ADP, with additional reporting required at the discretion of ADP during peak activity periods. Written status reports from the Contractor(s) and subcontractors shall contain the following information at a minimum:
 - 1. A list of open workplans and projects including but not limited to media relations, promotion, outreach, and collateral development.
 - 2. Status of progress and accomplishments for each workplan and project.
 - 3. Description of steps remaining for completion of each workplan and project, and the date each step will be completed.
 - 4. Problems encountered under this contract, future performance under this contract, and any other subjects of concern to the contractor(s) or related to the completion of work under this contract.
 - 5. The names of primary and alternate Contractor(s) and State employees assigned to coordinate and implement the workplan or project.
 - 6. Date of the status report and distribution list.
- L. Coordinate monthly planning conference calls regarding future activities of the public relations campaign. Calls may cover, but are not limited to:
 - 1. Research and strategic planning
 - 2. Media relations
 - 3. Promotion/ Outreach

4. External Communication

M. Conduct a highly visible launch event.

Attachment E

Conflict of Interest Certification

- A. This certification shall be completed and submitted with the mandatory Letter of Intent and with the proposal.
- B. ADP intends to avoid conflicts of interest or the appearance of conflicts of interest on the part of the Proposer/Contractor, subcontractors, or employees, officers and directors of the Contractor or subcontractors. Thus, ADP reserves the right to determine, at its sole discretion, whether any information received from any source indicates the existence of a conflict of interest. For purposes of this certification and disclosing conflicts of interest, "Proposer/Contractor" includes holding companies, parent companies, and affiliate companies.
- C. Conflicts of interest include, but are not limited to, the following examples:
 - 1. An instance when the Proposer/Contractor or any of its subcontractors, or any employee, officer, or director of the Proposer/Contractor or any subcontractor holds a position of interest, financial or otherwise, which would allow use or disclosure of information obtained while performing services for the Campaign, for private or personal benefit or for any purpose that is contrary to the goals and objectives of the Campaign.
 - 2. Employing, subcontracting or otherwise remunerating any immediate family member of an ADP employee for work or services performed on the Media Campaign. Immediate family includes any parent, spouse, child, or domestic partner.
 - 3. Receiving assistance from persons providing advice to ADP in the development of the California Methamphetamine Initiative (Steve Jefferies, Mary Ault, Kevin Farrell, Terry Robinson, Madeline Rucker, Laurie A. Drabble, Don Fultz, Rick Rawson, Marty Jessup, Dana Van Gorder, Maxine Mantell).
- D. If ADP is aware of a known or suspected conflict of interest, the Proposer/Contractor will be given an opportunity to submit additional information or to resolve the conflict. A Proposer/Contractor with a suspected conflict of interest will have five (5) working days from the date of notification of the conflict by ADP to provide complete information regarding the suspected conflict. If a conflict of interest is determined to exist by ADP and cannot be resolved to the satisfaction of ADP, before or after the award of the contract, the conflict will be grounds for rejection of the proposal and/or termination of the contract.
- E. The Proposer shall place this Certificate in the proposal. This Certificate shall bear the original signature of an official or employee of the Proposer who is authorized to bind the Proposer.

- F. This Certificate will be incorporated into the contract, if any, awarded from this RFP. It is understood that this requirement shall be in effect for the entire term of the contract. The Contractor shall also obtain a completed Conflict of Interest Certification from each proposed subcontractor and submit it to ADP prior to approval of the subcontractor by ADP.
- G. The Contractor and each subcontractor, via the Contractor, shall notify ADP within ten working days of any change to the information provided on this Certificate.
- H. ADP's determination of a suspected or potential conflict of interest will be based on all of the Contractor's/Proposer's business affiliations and contractual relationships. If the Proposer or any of its subsidiaries or its parent company is in any way connected to, and/or involved with, and/or engaged in the exchange of information with a company involved in, or company with a subsidiary involved in, the production, distribution, or marketing of licit drugs or alcohol products, the Proposer will be deemed to have a potential conflict of interest. If the Proposer has a suspected or potential conflict of interest, the Proposer shall attach to this form a description of the relationship, a plan for ensuring that such a relationship will not adversely affect ADP, and procedures to guard against the existence of an actual conflict of interest.

The undersigned hereby affirms that: (check one)

- ☐ The statements above have been read, and the undersigned agency has determined that no conflict of interest exists.
- ☐ A suspected or potential conflict of interest does exist, and additional information (as described in H above) is attached along with a plan to address the possible conflict of interest.

Date: _____

Signature

Print Name of Authorized Representative

Agency

Attachment F

SAMPLE BUDGET

Advertising

Use for each phase (Year I, II, and III)

DIRECT LABOR Please list Position Titles and Names	% of Time	Hours Per month	Hourly Rate	Total
		@	\$	\$
		@	\$	\$
		@	\$	\$
		@	\$	\$
Subtotal, Direct Labor				
INDIRECT COSTS (Consultant's Overhead and Fringe Benefits)				
Overhead	%		\$	
Fringe Benefits	%		\$	
Subtotal, Indirect Costs				
TOTAL SUBCONTRACT EXPENSES (Itemize Type of Subcontracting Work & total Cost. Attach a separate Cost Proposal for Each Subcontractor)				
OTHER DIRECT COSTS (Except Labor)	% of Direct Costs		Total	
Advertising Production(Inclusive costs to produce advertisements)			\$	
Gross media buys (Insert Net Media Buys Amount Here) \$ _____			\$	
DVBE sub-contractor at least 3% of the total dollar amount of the proposal			\$	
			\$	

			\$
Travel			\$
Supplies			\$
Other Direct Costs (Except Labor)- itemize any expenses over \$500 on a separate attachment			\$
Subtotal, Other Direct Costs			\$
	% Of Total Contract		
PROFIT			

GRAND TOTAL			\$
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ADDITIONAL REQUIRED COST INFORMATION FOR COST EVALUATION ONLY			AMOUNT
Value of Bonus Media			\$

Attachment G

SAMPLE BUDGET Public Relations

Use for each phase (Year I, II, and III)

DIRECT LABOR Please list Position Titles and Names	% of Time	Hours Per month	Hourly Rate	Total
		@	\$	\$
		@	\$	\$
		@	\$	\$
		@	\$	\$
Subtotal, Direct Labor				
INDIRECT COSTS (Consultant's Overhead and Fringe Benefits)				
Overhead	%		\$	
Fringe Benefits	%		\$	
Subtotal, Indirect Costs				
TOTAL SUBCONTRACT EXPENSES (Itemize Type of Subcontracting Work & total Cost. Attach a separate Cost Proposal for Each Subcontractor)				
OTHER DIRECT COSTS (Except Labor)	% of Direct Costs		Total	
Public Relations costs			\$	
\$ _____			\$	
DVBE sub-contractor at least 3% of the total dollar amount of the proposal			\$	
			\$	

			\$
Travel			\$
Supplies			\$
Other Direct Costs (Except Labor)- itemize any expenses over \$500 on a separate attachment			\$
Subtotal, Other Direct Costs			\$
	% Of Total Contract		
PROFIT			

GRAND TOTAL			\$
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ADDITIONAL REQUIRED COST INFORMATION FOR COST EVALUATION ONLY			AMOUNT
Value of Bonus Media			\$

Attachment H

DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION

A. GENERAL OPTIONS

When the DVBE participation requirements have been included in the RFP, there are three basic ways for bidders to meet the requirements for this program:

1. Achieve the minimum DVBE participation goals.
2. Make and document a “good faith effort” to achieve participation.
3. Submit and have approved a DVBE Utilization Plan. Utilization Plans are administered by DGS Procurement Small Business/DVBE Outreach & Education Section and apply to contracts for goods and information technology.

B. MEETING GOALS

There are two methods of meeting the goals. If a bidder is a:

1. DVBE: Commit to perform not less than three percent (3%) of the dollar amount of the bid or
2. Non-DVBE: Commit to use DVBEs for not less than three percent (3%) of the dollar amount of the bid.

C. CONTRACT GOAL OR GOOD FAITH EFFORT

In order to be “responsive” to this requirement, the bidder must:

- a. Use three percent (3%) or more of proposed bid amount to reimburse Disabled Veteran Business Enterprise(s) (DVBEs) to perform contract services. Complete Exhibit A of this Attachment.

OR

Make a “good faith effort” to find DVBEs to perform proposed contract services by doing all of the steps outlined in Exhibit B of this Attachment.

Note: DVBEs are for-profit entities only.

D. DOCUMENTATION REQUIREMENTS

- a. Exhibit A must be completed showing the type of work and company proposed for DVBE participation, their subcontractor (if any), and other related information. If no DVBEs are to be used state "N/A" or "None" on Exhibit A. Exhibit A is to be submitted in the Final Bid/Proposal whether the contract goal or the "good faith effort" alternative is chosen.
- b. The bidder must include a copy of the DVBE certification letter from the Office of Small Business and DVBE Certification (OSDC) for each firm listed on Exhibit A.
- c. In addition to the above, for those bidders opting to document a "good faith effort," (see Exhibit B) the bidder must document the following:
 - ◆ Contacts with this Department, other state and federal governmental agencies, and at least two local organizations that helped identify or provided a list of interested DVBEs for this contract.
 - ◆ Advertisements in trade and focus papers. Note: Dual trade and focus paper advertising is acceptable.
 - ◆ Solicitations to potential DVBE subcontractors/consultants/ suppliers for this contract with sufficient lead time to fully entertain and consider responding bids. Solicitations and responses may be by direct mail, telephone, FAX , Internet or E-mail.
 - ◆ Selection of DVBEs (use Exhibit A).
 - ◆ Non-selection of potential subcontractors/consultant/suppliers.

E. USE OF PROPOSED DVBEs

If awarded the contract, the successful bidder must use the DVBE subcontractor, consultant, and/or supplier(s) proposed unless the Contractor requests substitution via written notice to the State and the State has approved such substitution.

Failure to adhere to at least the DVBE participation proposed by the contractor may be cause for contract termination and recovery of damages under the rights and remedies due the State under the default section of the contract.

F. CONTRACT AUDITS

Contractor agrees that the State or its delegate will have the right to review, obtain, and copy all records pertaining to performance of the contract. Contractor agrees to provide the State or its delegate with any relevant information requested and shall permit the State or its delegate access to its premises, upon reasonable notice, during normal business hours for the purpose of interviewing employees and inspecting and copying such books, records, accounts, and other materials that may be relevant to a matter under investigation for the purpose of determining compliance with this requirement. Contractor further agrees to maintain such records for a period of three (3) years after final payment under the contract.

EXHIBIT A
DISABLED VETERAN OWNED BUSINESS PARTICIPATION SUMMARY

DVBE COMPANY NAME	NATURE OF WORK	CONTRACTING WITH (BIDDER OR SUBCONTRACTOR)		CLAIMED DVBE DOLLAR AMOUNT	DVBE CERTIFIDATION ATTACHED (YES OR NO)
			TIER		

INSTRUCTIONS

Exhibit A is to be completed whether the contract goals or the "Good Faith Effort" alternative is chosen. If no participation is obtained, state "N/A" or "None" on the form.

COMPANY NAME: List the name of the DVBE subcontractor, consultant, or supplier proposed for participation.

NATURE OF WORK: Identify the proposed work to be performed by the DVBE listed.

CONTRACTING WITH: Indicate the name of the bidder or subcontractor with which the listed DVBE is directly contracting.

TIER: The contracting tier of the DVBE company should be indicated using the following level of designations:

- 0 = Bidder
- 1 = Direct subcontractor/consultant/supplier to bidder
- 2 = Subcontractor/consultant/supplier of Level 1

CLAIMED DVBE VALUE: The total dollar amount to be claimed by the DVBE under this contract.

CERTIFICATION: In order to obtain DVBE participation credit, a certification for the DVBE **MUST** be on file with the Office of Small Business and DVBE Certification. A copy of the certification from OSDG should be submitted with the final bid/proposal.

The certification must comply with the following requirements:

- ◆ Meet all requirements set forth in Article 6 (commencing with Section 999) of Chapter 6, Division 4 of the California Military Code; and
- ◆ Provide to the Office of Small Business and DVBE Certification, by no later than five o'clock on the date on which the subject bid is due, an Award of Entitlement from the U.S. Department of Veterans Affairs or the U.S. Department of Defense, issued within six (6) months of the date on which certification is sought, which would certify or declare the existence of a service-connected disability, of at least 10 percent, at the time of application for or renewal of certification as a DVBE.

EXHIBIT B
SAMPLE DOCUMENTATION OF A GOOD FAITH EFFORT

STEP 1: CONTACT AND DOCUMENT RESOURCES TO IDENTIFY DVBS

Document, using the following format as a guideline, the contacts made with the awarding Department, other state and federal agencies and local organizations (at least two) that will help identify potential DVBEs for participation in your proposal.

AWARDING DEPARTMENT:

Organization Name: State Department of Alcohol and Drug Programs

Contact: Margret Davis

Telephone #: (916) 323-5709

Date/Time: _____

Outcome: _____

STATE AGENCY:

Organization Name: Office of Small Business and DVBE Certification

Contact: Voice Mail Gloria Anderson

Telephone #: (916) 375-4936, 1800-559-5529

Internet Address: gloria.anderson@dgs.ca.gov

Date/Time: _____

Outcome: _____

FEDERAL AGENCY:

Organization Name: Federal Small Business Administration

Contact: Internet Access only

Internet Address: <http://www.pronet.sba.gov>

Date/Time: _____

Outcome: (attach list of potential firms downloaded)

Note: Verify firms are **California** certified DVBEs

LOCAL RESOURCE ORGANIZATIONS (AT LEAST 2):

Organization Name: Office of Small Business and DVBE Certification

Contact: Voice Mail Gloria Anderson

Telephone #: (916) 375-4936, 1800-559-5529

Publications Internet Address: <http://www.pd.dgs.ca.gov/publications>

Date/Time: _____

Outcome: _____

Organization Name: _____

Contact: _____

Telephone #: _____

Date/Time: _____

Outcome: _____

EXHIBIT B (Continued)

Organization Name: _____
Contact: _____
Telephone #: _____
Date/Time: _____
Outcome: _____

STEP 2: ADVERTISE To obtain a list of Trade and Focus Papers, call the Office of Small Business Certification & Resources (OSBCR) (322-5060) for a copy of their State Contracting Resource Packet. The Resource Packet is also available on the internet at the following address: <http://www.dgs.ca.gov/osbcr>.

1. Advertise in at least one trade paper and one paper focusing on DVBEs. Note: one ad in a dual trade and focus paper is acceptable.
2. Ads should appear in the paper(s) with sufficient lead time for potential DVBEs to respond and for you to fully consider their participation in the contract. Sufficient lead time is at least 14 calendar days prior to this RFP's proposal due date. Reminder: most papers are issued bimonthly or monthly, not daily, therefore, your ad placement must be timely.
3. Attach copies of the advertisement(s) to your proposal.

STEP 3: SOLICIT/CONSIDER DVBEs AND DOCUMENT SOLICITATIONS

1. Invite potential DVBEs, identified through Steps 1 and 2 above, to supply the needed service or supplies. This may be done via: direct mail, telephone, FAX, or E-mail.
2. Using the following format as a guideline, document your solicitations.

Organization Name: _____
Organization Address: _____
Organization Telephone # or E-mail address: _____
Contact Person: _____
How Solicited (mail, telephone, FAX, E-mail) _____
Date of Solicitation: _____
Nature of Work: _____
Selected – Yes: List on Exhibit A and attached corresponding certification
Selected – No: (indicate reason) _____

Attachment I

STATE ECONOMIC DEVELOPMENT INCENTIVE PROGRAMS

SMALL BUSINESS

TARGET AREA CONTRACT PREFERENCE ACT (TACPA)

ENTERPRISE ZONE ACT (EZA)

LOCAL AGENCY MILITARY BASE RECOVERY ACT (LAMBRA)

The following are the procedures for bidders to follow if they wish to apply for 5% Small Business preference; or TACPA, EZA, or LAMBRA preferences of 5% each plus up to 4% workforce preferences each.

SMALL BUSINESS PREFERENCE

Section 14835, et seq. of the California Government Code requires that a five percent (5%) preference be given to bidders who qualify as a Small Business or to non-small businesses claiming twenty-five percent California certified small business subcontractor participation. If claiming the non-small business subcontractor preference, the bid response must include a list of the small business(es) with which you commit to subcontract in an amount of at least twenty-five percent of the net bid price with one or more California certified small businesses. Each listed certified small business must perform a "commercially useful function" in the performance of the contract as defined in Government Code Section 14837(d)(4).

The required list of California certified small business subcontractors must be attached to the bid response and must include the following:

- Subcontractor name;
- Address;
- Phone number;
- A description of the work to be performed and/or products supplied; and,
- The dollar amount or percentage of the net bid price (as specified in the solicitation) per subcontractor.

In addition to the list, bidders must identify small business subcontractors on their Project Budget. The rules and regulations of this law, including the definition of small business for the delivery of services, are contained in Title 2, California administrative Code, Section 1896 et seq. A copy of the regulations is available upon request. To claim the small business preference, which may not exceed \$50,000 for any bid, your or the subcontractor firm must have its principal place of business located in California and be certified by the State Office of Small Business Certification and Resources. Questions regarding the preference approval should be directed to that office at (916) 375-4940.

If you are claiming Small Business preference please complete the following small business information on you or your subcontractor(s) and return with your proposal:

Bidder's Small Business Number:_____ or date applied for
Certification:_____

Subcontractor Small Business Number:_____ or date applied for
Certification:_____

TACPA/EZA/LAMBRA PREFERENCES

(Applies when the bidder is able to pick the work site where services will be provided. Providing technical assistance statewide on an as needed basis does not qualify.)

Under the provisions of the TACPA, Government Code Section 4530 et seq., EZA, Government Code Section 7070 et seq., and LAMBRA, Government Code 7118 et seq., preferences are available to California based companies that demonstrate and certify under penalty of perjury that at least 50% of the total labor hours for manufactured goods, or 90% of the total labor hours for services (100% in the case of LAMBRA) will be performed in distressed areas. The Acts also makes available additional preferences to California based bidders who certify under penalty of perjury to hire persons in targeted employment areas.

Bidders are not required to apply for TACPA/EZA/LAMBRA preferences, and denial of preference requests is not a basis for rejection of the bid.

If bidders wish to be considered for the preferences, they must demonstrate and certify that they will comply with the requirements of these Acts. Bidders must complete and submit the applicable forms listed below. The information provided must demonstrate that the bidder has the ability to comply with the terms and provisions of the preference programs. The State, as part of its evaluation process, reserves the right to verify, validate, and clarify all information contained in the bid. This may include, but is not limited to; information from bidders, manufactures, subcontractors and any other sources available at the time of bid evaluation. Refusal to agree to and/or comply with these terms, or failure to provide additional supporting information at the State's request, may result in denial of the preferences requested.

Bidders applying for preference(s) must submit the following form(s):

TACPA – STD 830 <http://www.documents.dgs.ca.gov/osp/pdf/std830.pdf>
EZA – STD 831 <http://www.documents.dgs.ca.gov/osp/pdf/std831.pdf>
LAMBRA – STD 832 <http://www.documents.dgs.ca.gov/osp/pdf/std832.pdf>

SCORING PREFERENCES

The preference(s) will be based on the score of the bidder with the highest score that is not applying for the preference(s).

Example: The score of the highest scored proposal (that is not applying for a preference) is 180 points. This score amount would be multiplied by a preference (for example 5%) to determine additional preference points. ($5\% \times 180 = 9$ points). All bids applying and qualifying for the preference would have these additional preference points (in this case, 9 points) added to their score.

Attachment J

EVALUATION AND SELECTION PROCESS

1. The ADP will use the evaluation and selection procedure specified in Section 10344(c) of the Public Contract Code (PCC) to select the proposal that will best meet ADP's needs. This procedure specifies award to be made to the responsible bidder with the highest total score.
2. Each proposal shall be reviewed to determine if the proposal meets the mandatory requirements specified in the RFP at Section IV.A. Proposals not meeting mandatory requirements at this point shall be disqualified and will not be further evaluated. These disqualified proposals shall not:
 - a. Have their remaining Technical Proposal scored.
 - b. Have their sealed Cost Proposal opened.
 - c. Be considered for an award of contract.
3. Technical Proposals shall then be submitted to the Selection Review Committee, which shall evaluate and score the written proposal. Points will be assigned to the Technical Proposal as shown in RFP Section IV. A minimum score of 80% must be achieved in the Technical Proposal to be considered responsive. A non-responsive proposal shall not be considered for an award of contract and shall not have its sealed cost envelope opened.
4. Technical Proposals that contain false or misleading statements, or which provide references, which do not support an attribute or condition claimed by the bidder, may be rejected. If, in the opinion of ADP, such information was intended to mislead ADP in its evaluation of the proposal, and the attribute, condition, or capability is a requirement of the RFP, it will be the basis for rejection of the proposal.
5. The bidder's response to each item in the RFP must be identified with the same numbers and letters of the paragraph to which the response applies. Failure to number responses in this manner may adversely affect the scoring of the bidder's proposal if reviewers are unable to locate responses. Omitted responses result in no score for that section and no contribution to the overall score. The Technical Proposal should follow the format of the RFP.
6. Evidence which indicates that the bidder, bidder's staff, and/or consultants have in any way attempted to influence the confidential nature of the review through contacts with ADP or ADP staff or members of the Selection Review Committee will result in the automatic rejection of the bid.

7. All proposals and scoring sheets shall be available for public inspection at the conclusion of the scoring process.

Attachment K

DEPARTMENT OF ALCOHOL AND DRUG PROGRAMS
TRAVEL AND SUBSISTENCE GUIDELINES
Effective 1-1-07

TRAVEL: ADP will pay transportation costs from your headquarters (this may be your home) to the place of the meeting, training, etc. Amounts claimed without justification are considered taxable income.

TRAVEL BY PERSONAL AUTOMOBILE:

48.5 cents per mile

Where public transportation is not available or is available only with an undue loss of time, mileage for your personal automobile is allowed. Where automobile travel is an option and there is adequate public transportation, travel allowance will be made on the basis of the cost of the lowest rail, bus, or air fare available in lieu of the automobile mileage.

SUBSISTENCE: Actual costs for meals, lodging and incidental expenses may be claimed in accordance with the following guidelines:

MEALS: Breakfast \$6.00 Lunch \$10.00 Dinner \$18.00 Total \$34.00

BREAKFAST: To claim breakfast, travel must begin before 6 a.m.

LUNCH: To claim lunch, travel must begin at or before 11 a.m.
No lunch allowance will be paid when travel status is for less than 24 hours.

DINNER: To claim dinner, travel must begin at or before 5 p.m.

FRACTIONAL DAY OF TRAVEL AT END OF TRIP:

Travel must end at or after:

8 a.m. for breakfast to be claimed
2 p.m. for lunch to be claimed
7 p.m. for dinner to be claimed

DEPARTMENT OF ALCOHOL AND DRUG PROGRAMS
TRAVEL AND SUBSISTENCE GUIDELINES
EFFECTIVE 1-1-07

FOR TRAVEL OF LESS THAN 24 HOURS:

Travel must begin at or before 6 a.m. and end at or after 9 a.m. to claim breakfast.
Travel must begin at or before 4 p.m. and end at or after 7 p.m. to claim dinner.
No lunch or incidentals may be reimbursed on travel of less than 24 hours.

LODGING:

\$84.00 With receipt for actual cost up to \$84.00 plus tax.

\$110.00 With receipt for actual cost up to \$110 plus tax for the counties of Los Angeles and San Diego.

\$140.00 With receipt for actual cost up to \$140 plus tax for the counties of Alameda, San Francisco, San Mateo, and Santa Clara.

INCIDENTALS: \$6.00 for each full 24-period

Incidental expenses include tips, newspapers and magazines, personal telephone calls, laundry and dry cleaning, and whatever small miscellaneous expenses are incurred during the course of travel. No incidental expense reimbursement is allowed for period of less than 24 hours. No receipts are required.

OTHER ALLOWABLE COSTS: Taxi fares, airport shuttle fares, parking, etc. are reimbursable as used in connection with State business, providing original receipts are submitted with the claim.